

MDOS Billing Pro©

Release 4 of Version 2: MS SQL Server Version

Advanced **M**edical **O**ffice **S**oftware, LLC

info@advmdos.com

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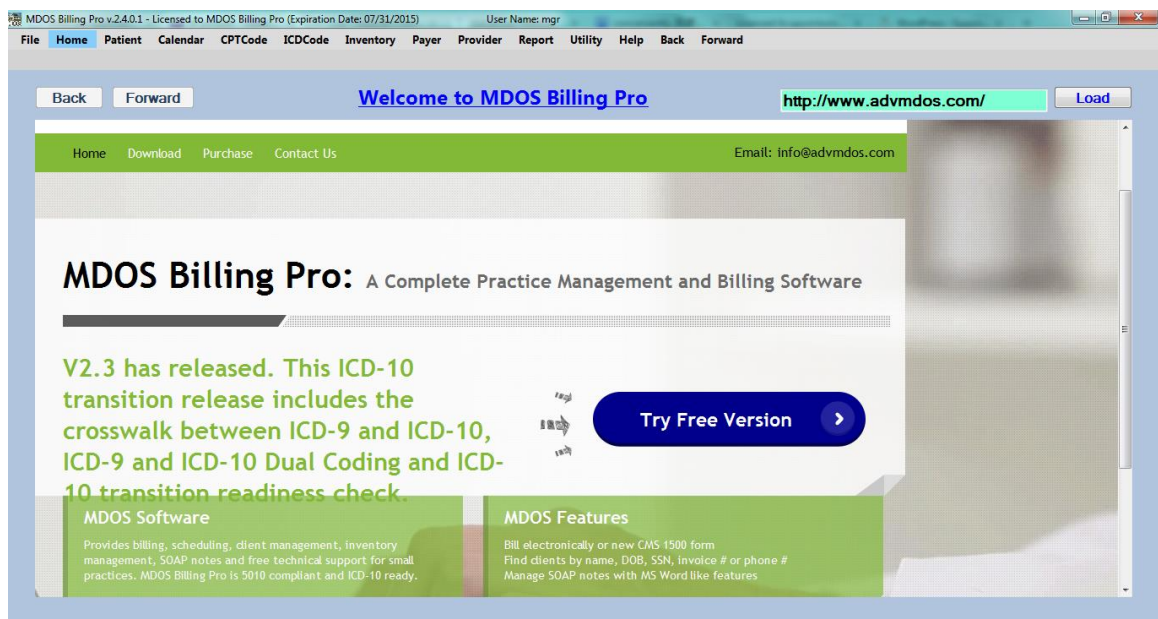
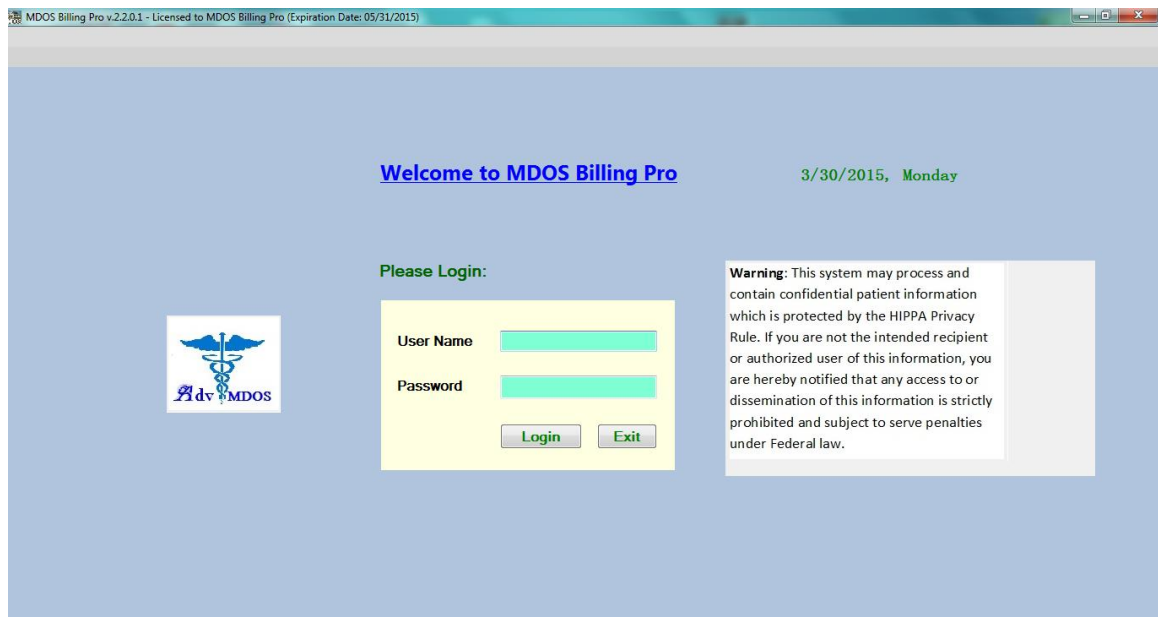
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Chapter 1 Home, Help, Forward and Back Menu

A. Home Page

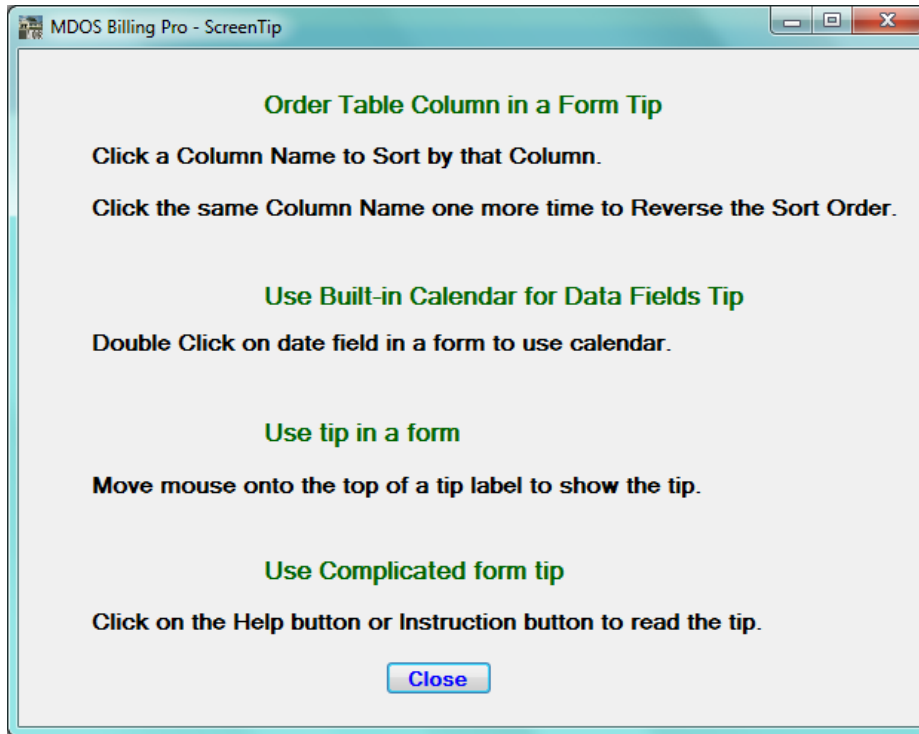
Home Page is the page you see after login. The default is the MDOS Billing Pro© website home page. You can change the default home page to your favorite webpage via instruction on page 5.

Super user mgr can manage MDOS users and audit user logins, which is one of the HIPAA requirements (more detail on page 5).

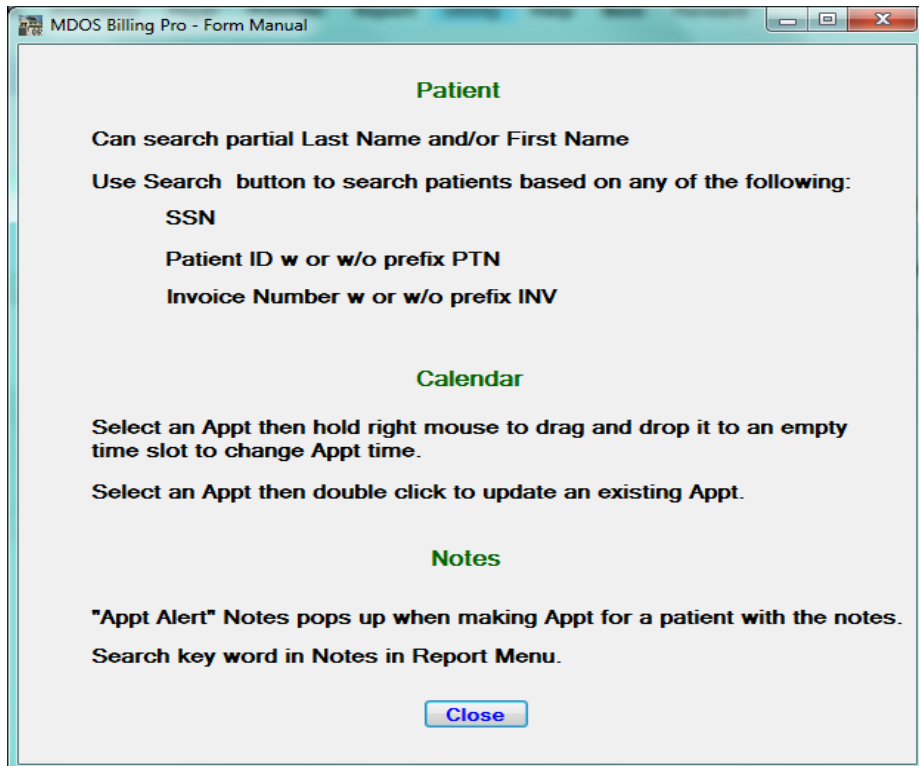


B. Help Menu

Help Menu *Screen Tip* presents some common tips for using MDOS Billing Pro©.

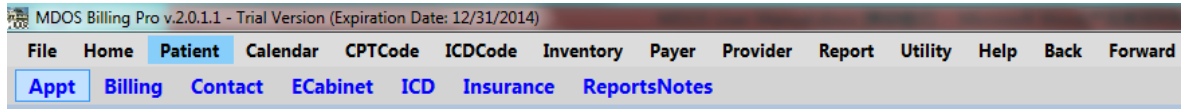


Help Menu *Form Manual* lists some frequently used features.



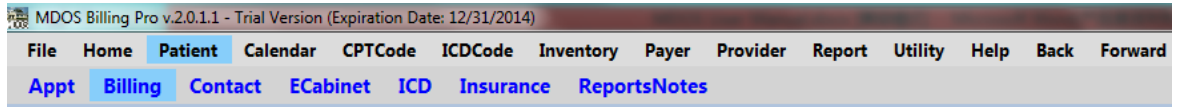
C. Forward Menu

Forward Menu is the rightmost menu that lets you reverse Back Menu operation.



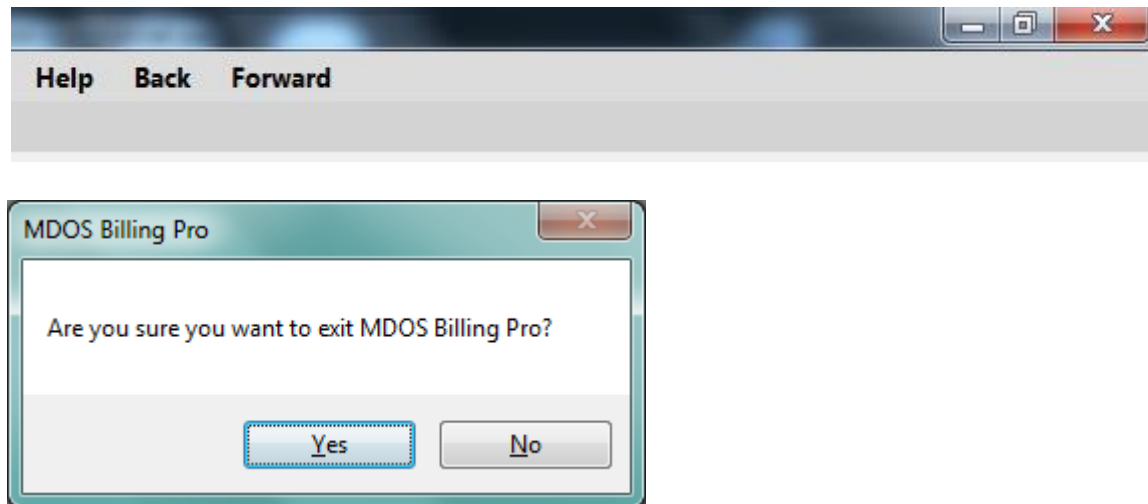
D. Back Menu

Back Menu is on the left side of Forward Menu. It lets you to go back to the page you were previously on.



E. Close MDOS

Use **Exit** option from File Menu to close MDOS. Or use the X on the upper right corner to close MDOS.



Chapter 2 Utility Menu (Customizing Setting)

A. Home Page Setup

Advanced Medical Office Software website is loaded after login. To display another website, enter the website URL and **Save as Home Page** (Underlined and Bold words represent a Button in MDOS in this manual). The saved website will be displayed the next time you login.

B. Password Setup

Enter new password twice on the upper right corner to **Reset Password**. The new password will be effective the next time you login.

C. User Setup

Login as super user ***mgr*** to setup **User Accounts** or audit user logins (this is one of the HIPAA requirements). The administrator role can create new users, reset existing user passwords and audit user logins. The *Acct Name* can be existing users or new users.

Account Name	Administrator	Active
admin	No	☒
mgr	Yes	☒

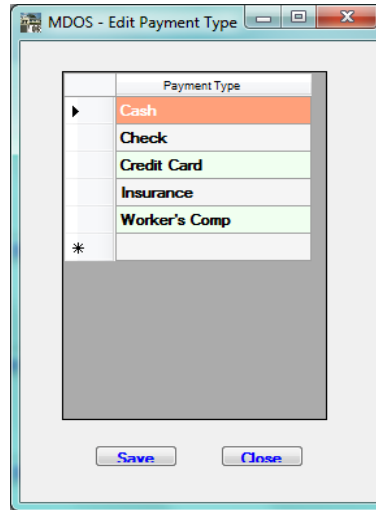
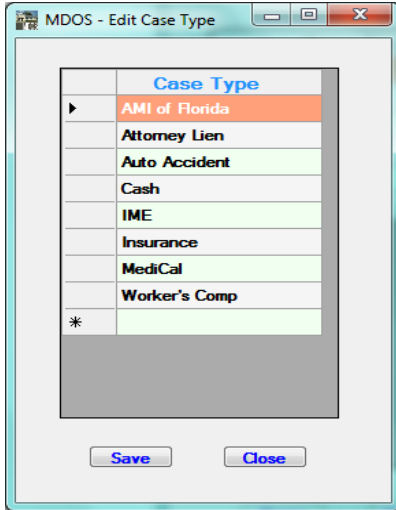
Account Name	Login Time	Logout Time
admin	1/20/2015 6:26 AM	1/20/2015 6:44 AM
admin	1/20/2015 6:24 AM	1/20/2015 6:25 AM
admin	1/17/2015 5:01 PM	1/17/2015 6:20 PM
admin	1/17/2015 8:32 AM	1/17/2015 2:57 PM
admin	1/16/2015 6:34 PM	1/16/2015 6:41 PM
admin	1/16/2015 6:09 PM	1/16/2015 6:30 PM
admin	1/16/2015 2:40 PM	1/16/2015 2:44 PM
admin	1/16/2015 8:09 AM	1/16/2015 2:44 PM
admin	1/15/2015 8:39 PM	1/15/2015 8:47 PM
admin	1/15/2015 9:40 AM	1/15/2015 7:44 PM
admin	1/14/2015 6:35 PM	1/14/2015 6:54 PM
admin	1/14/2015 8:20 AM	1/14/2015 9:19 AM
admin	1/14/2015 8:05 AM	1/14/2015 9:19 AM
admin	1/13/2015 6:25 PM	1/13/2015 8:09 PM
admin	1/13/2015 10:39 AM	1/13/2015 6:24 PM
admin	1/12/2015 8:06 PM	1/12/2015 8:15 PM
admin	1/12/2015 8:29 AM	1/12/2015 7:00 PM
admin	1/10/2015 3:50 PM	1/10/2015 5:19 PM
admin	1/10/2015 10:43 AM	1/10/2015 3:00 PM
admin	1/10/2015 10:01 AM	1/10/2015 3:00 PM
admin	1/10/2015 9:56 AM	1/10/2015 3:00 PM

D. Patient Case Type Setup

Click **Edit** in “Patient Case Type” to add/change/delete the pre-loaded Patient Case Type.
Add: Type the new type in the * column and click **Save**.

Change: Click the row you want to change, change the word(s) and click **Save**.

Delete: Click the row you want to delete, erase all the letters in that row and click **Save**.

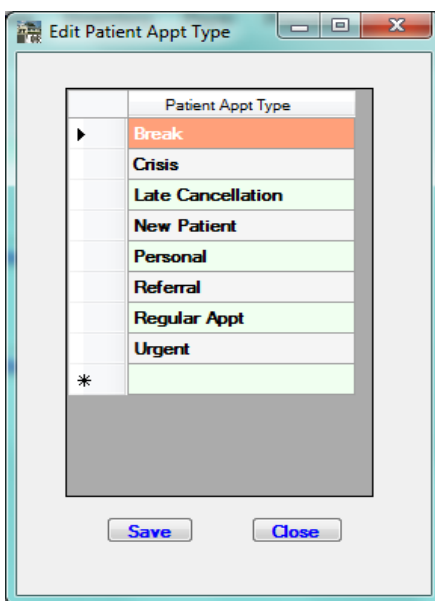


E. Patient Payment Type Setup

Click **Edit** in “Patient Payment Type” and use the same method in *Patient Case Type Setup* on previous page to add/change/delete the pre-loaded Patient Payment Type.

F. Patient Appointment Type Setup

Click **Edit** in “Patient Appointment Type” and use the same method in *Patient Case Type Setup* on previous page to add/change/delete the pre-loaded Patient Appointment Type.



G. ClearingHouse Setup

You should contact a clearing house and open an account before you can send e-Bills electronically. MDOS Billing Pro© pre-loads two clearing houses: Post-N-Track and Availity. You can use other clearing houses you like. You need consider at least three things to pick a clearing house:

- (1) Cost.
- (2) Payer list.
- (3) How easy it is to send out e-Bills on a daily basis.

The two clearing houses mentioned above are free to providers.

You can **Generate e-Bill** in Patient CMS1500 sub-menu and transfer the e-Bills using clearing house software or upload in the clearing house website. The clearing house will validate the e-Bills and then send to various payers. Normally you can check out your e-Bill status to see if there are any errors in your submission within 30 minutes after sending to the clearing house.

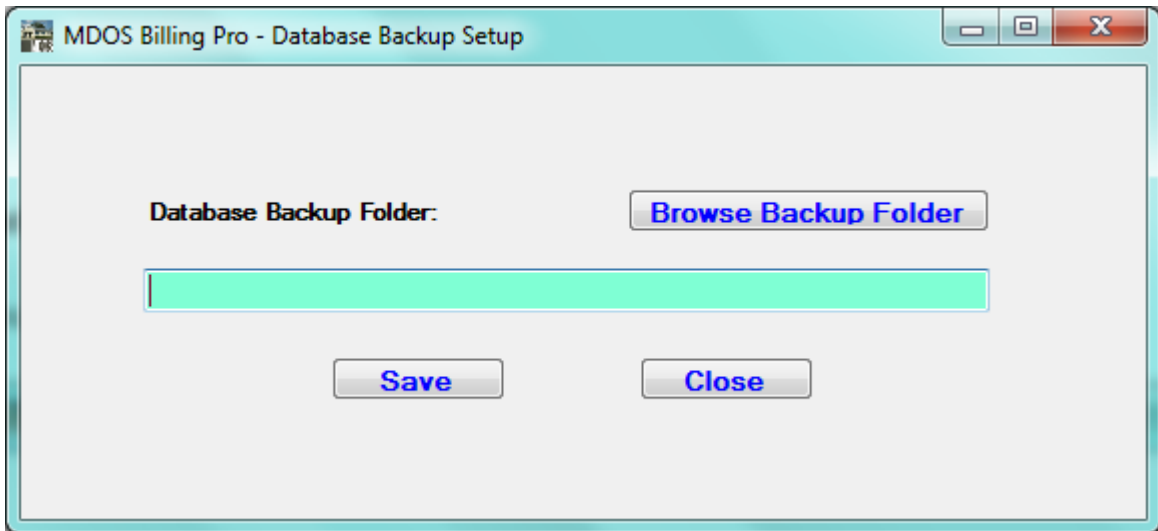
The clearing house will then submit your validated e-Bills to various payers periodically or the various payers will pick up the e-Bills from clearing house server based on the clearing house and payer arrangement.

Payer ID	Payer Name	Clearinghouse Name	Payer e-Bill ID	Payer e-Bill Mode	Contract With
PER100063	Aetna	Post-N-Track	60054	P	Practice
PER100062	Cigna	Post-N-Track	62308	P	Provider
PER100065	Cigna Payor 62308	Post-N-Track	62308	P	Provider
PER100060	UHC	Post-N-Track	87726	P	Practice

You can check your e-Bills status from payer within a day or two. Normally you have the option to setup the remittance advice electronically from payer. If needed, you can use Patient 1500CMS sub-menu to generate Replacement and Void e-Bills. For more details on clearing house setup, see the last paragraph of chapter 12 (Technical Support).

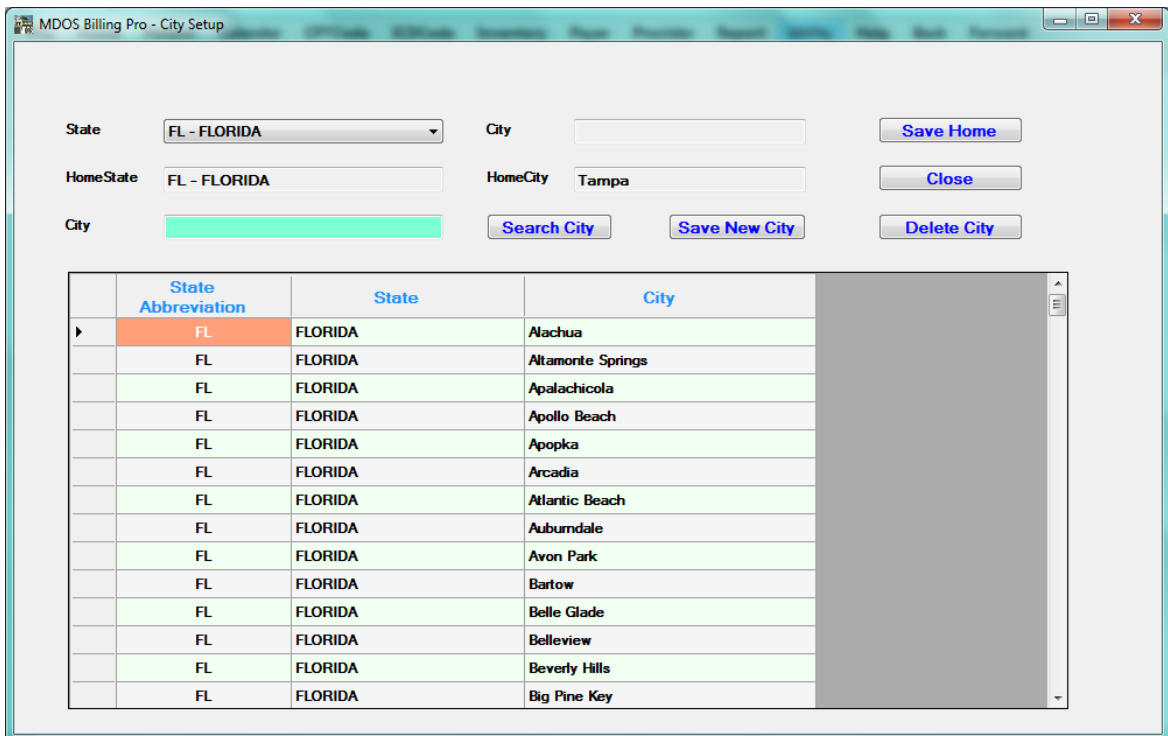
H. Database Backup Setup

You can choose a folder to backup MDOS databases.



I. City Setup

You can add/delete cities from MDOS database. The HomeState and HomeCity are the State and City where you practice business resides. They will be the default state and city populated for you when you create a new patient to save a couple of mouse clicks.



J. Email Setup

MDOS uses Gmail account to send out emails. You can create a Gmail account for free if you do not have Gmail account for your practice.

Test Full Email and Test Email First Name are used by **Test** to send a test email during the email setup process. The test email can be any email account you already have.

You can use **Help** to setup Email Notice Days.

We found out in January 2015 that Google changed its Gmail setting and that requires us to set the Gmail accounts as below in order to send email from MDOS.

Step A: Use *strong password*.

Strong Password: Length ≥ 8 , with uppercase and lowercase letters, with number(s), and special character(s) (@_#).

Step B: Enable *Less secure apps*.

Go to <https://security.google.com/settings/security/activity>. Login to your Gmail account and change *Less secure apps* from Disable to Enable.

The image shows two screenshots of the Google 'Less secure apps' settings page. The top screenshot shows the 'Disable' option selected for 'Access for less secure apps'. The bottom screenshot shows the 'Enable' option selected, with a yellow 'Updated.' notification box at the top.

Less secure apps

Some devices and apps use insecure sign-in technology to access your data. Choosing **Disable** prevents these less secure devices and apps from accessing your Google Account. Choosing **Enable** increases your chances of unauthorized account access but allows you to continue using these less secure devices and apps. [Learn more](#)

Access for less secure apps ☒ Disable ☐ Enable

Updated.

Some devices and apps use insecure sign-in technology to access your data. Choosing **Disable** prevents these less secure devices and apps from accessing your Google Account. Choosing **Enable** increases your chances of unauthorized account access but allows you to continue using these less secure devices and apps. [Learn more](#)

Access for less secure apps ☐ Disable ☒ Enable

The screenshot shows the 'Appointment Email' tab in the 'MDOS Billing Pro - Email Setup' window. The fields are as follows:

- From Email:** robertchen369@gmail.com
- Password:** [Redacted]
- CC Full Email:** hailinc@yahoo.com
- Test Full Email:** robertchen258@yahoo.com
- Test Email First Name:** Robert
- Email Notice:** 4 Days (1-3)
- Opens on:** Mon, Tues, Wed, Thurs, Fri, Sat (all checked), Sun (unchecked)
- Email Subject:** Your Appointment with Bay Area Oriental Family Practice
- Email First Line:** Dear (First Name From Database)
- First Line End With:** .
- Email Body:** (Appointment Detail will be Appended to the Email Body.)
This is the automatic reminder that you have an appointment with us.
- Email Name:** Dr. Yali Fan (Example: Dr. Yali Fan)
- Email Signature:** Dr. Yali Fan
Bay Area Oriental Family Practice
(813) 882-8373
www.baofp.com

Buttons at the bottom: Test, Save, Close.

Use the above **Appointment Email** tab to setup appointment email. Use the below **Birthday Email** tab to setup birthday email. You need to setup Open Days above even if you do not use Appointment Email but use Birthday Email. We send out daily Appointment Email and Birthday Email in Calendar form.

The screenshot shows the 'Birthday Email' tab in the 'MDOS Billing Pro - Email Setup' window. The fields are as follows:

- From Email:** robertchen369@gmail.com
- Password:** [Redacted]
- Use Appt Email:** [Checked]
- CC Full Email:** hailinc@yahoo.com
- NOT Use CC:** [Checked]
- Test Email:** robertchen258@yahoo.com
- Test Email First Name:** Robert
- Email 1st Line:** Dear
- End With:** .
- NOT Use 1st Line:** [Unchecked]
- Email Name:** Dr. Yali Fan
- Email Subject:** Happy Birthday from Bay Area Oriental Family Practice
- Email Body:** Happy Birthday to You!
- Email Signature:** Dr. Yali Fan
Bay Area Oriental Family Practice
(813) 882-8373
www.baofp.com

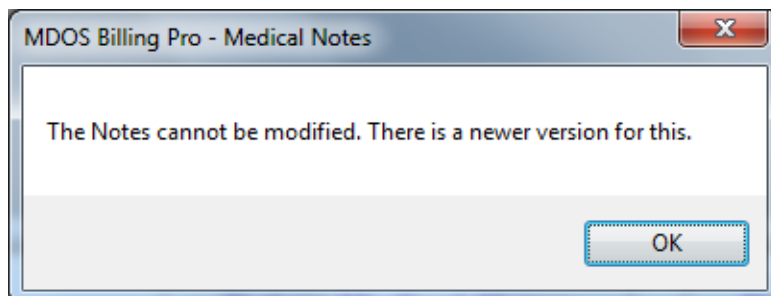
Buttons at the bottom: Test, Save, Close.

K. MDOS Security Setup

This setup is available when user login as *mgr* instead of *admin*.

The *mgr* user can set security rules on whether *admin* user can make changes or not to the Clearinghouse setting, Email setting, add/change payer, add/change provider. These security rules can be reversed at any time.

The Medical Notes setting is used when the user wants to prevent changes to Notes created the day before or earlier. The Notes will become read-only after midnight and the user can only save a new version so that the original Notes will be preserved. This setting is useful when a treatment is involved in a law suit. Please note that this Medical Notes setting cannot be reversed once it is set. The screenshot below pops up when you open Notes that have a newer version in the database.



L. Network IP Address List

This utility lists all the IP addresses of the devices that are connected to the network, including the external network IP address, which is useful if you want to connect from home to your office.

Same Patient Multiple Appointments in the Same Day

No ☐ Yes, Multiple Appoinrmets Allowed ☒

Save

Network IP Address List

MDOS Billing Pro - Network IP Addresses

Current MDOS database server IP Address: .

Save Close

Select a computer from the list below and save for use next time:

Device_Name (Local Computer): AdvMDOS-HP.	IP_Address: .
Device_Name (Local Computer): AdvMDOS-HP.	IP_Address: 192.168.1.67 Display-Only
Network External IP Address: .	IP_Address: 71.98.194.248
Device_Name: dslmodem.domain.	IP_Address: 192.168.1.1

Chapter 3 Payer Menu

A. Payer Menu

Several payers are pre-loaded. You should click a payer in the table and **change the default address for the payer**. Otherwise your paper CMS 1500 form may be sent to the wrong address.

You should check out clearing house payer list on their website to pick a clearing house for a new payer or changing clearing house for a pre-loaded payer.

MDOS Billing Pro v2.0.1.1 - Trial Version (Expiration Date: 12/31/2014)

File Home Patient Calendar CPTCode ICDCode Inventory **Payer** Provider Report Utility Help Back Forward

Load WebSite

Payer Name **BCBSF** Address Line1 **PO Box 1798** Address Line2

State **FL - FLORIDA** City **Jacksonville** Zip **32231-0014**

Website **www.bcbsfl.com** Email **socialmedia@bcbsfl.com** Phone **(800) 727-2227**

Clearinghouse **Availity** Payer Contract With **Practice** Fax **(877) 480-8130**

	Payer Name	Address Line1	Address Line2	City	State	Zip	Phone	Fax	Email	WebSite
1	Aetna	P.O.Box 981106		El Paso	TX	79998-1106				
2	Baycare Health Systems	1000 Great-West Drive		Kennett	MO	63857-3749	8772294942			
3	BCBSF	PO Box 1798		Jacksonville	FL	32231-0014	8007272227	8774808130	socialmedia@bcbsfl.com	www.bcbsfl.com
4	Cigna	PO Box 182223		Chattanooga	TN	37422-7223				
5	D & D Associates	P.O.Box 9150		Garden City	NY	11530	5163268800	8324850747	ime@ddassociates.com	
6	FL Medicare Part B	P.O. Box 2360		Jacksonville	FL	32231-0018	8664549007			www.fcso.com
7	Humana	PO Box 14601		Lexington	KY	40512-4601				
8	MHBP	P.O Box 8402		London	KY	40742	8004107778			www.mhbp.com
9	NALC Health Benefit Plan	20547 Waverly Court		Ashburn	VA	20149-0001	8886366252			www.nalc.org/depart
10	Regence Blue Shield PPO	Po Box 30271		Salt Lake City	UT	84130-0271	8002530838		www.myregence.com	WWW.regence.com/
11	United Healthcare	Po Box 740809		Atlanta	GA	30374-0809	8887921545			WWW.myuhc.com

Save Payer Search All Payers Add Delete Save

Chapter 4 Provider Menu

A. Add First Provider

Select the dummy provider and change its information to your information and **Save**.

MDOS Billing Pro v2.0.1.1 - Trial Version (Expiration Date: 12/31/2014)

File Home Patient Calendar CPTCode ICDCode Inventory Payer **Provider** Report Utility Help Back Forward

Provider Referring Doctor

Provider Name: **Dr. Jane Doe AP** Provider NPI: **1234567890** Provider Other ID Type: **OB** Other ID: **AP 999**

Provider Address: **123 Any Road** State: **FL - FLORIDA** City: **Tampa** Zip: **33333-3333**

Facility Name: **Florida Medical Practice, P.A.** Facility NPI: **1234567890** Facility Other ID Type: **OB** Other ID: **AP 999**

Facility Address: **123 Any Road** State: **FL - FLORIDA** City: **Tampa** Zip: **33333-3333**

Federal Tax ID: **010456789** Tax Type: **EIN** Signature: **Signature on File** Signature Date: **01/01/2005** Load WebSite

Email: **janedoe@yahoo.com** Fax: **(813) 888-3333** Website: **www.JaneDoe.com**

Provider Last Name: **Doe** Provider First Name: **Jane** Provider Phone: **(813) 888-3333**

	Provider ID	Provider Name	Provider NPI	Provider Other ID	Provider Phone	Provider Address	City	State	Zip	Facility Name
▶	PHY100001	Dr. Jane Doe AP	1234567890	AP 999	8138883333	123 Any Road	Tampa	FL	33333333	Florida Medical Practice, P.A.

Add Delete Save

B. Add More Than One Provider

Clear the screen. Enter the new provider information and **Save**.

C. Referring Doctor tab

This is optional and designed for the practices that have physician referral program.

MDOS Billing Pro v2.0.1.1 - Trial Version (Expiration Date: 12/31/2014)

File Home Patient Calendar CPTCode ICDCode Inventory Payer **Provider** Report Utility Help Back Forward

Provider Referring Doctor

Last Name: First Name: MI:

Full Name: Active: ☐

Address1: Address2:

State: City: Zip:

Phone: **() - -** Ext: Fax: **() - -** Load WebSite

Email: Website:

Last Name	First Name	MI	Full Name	Address1	Address2	City	State	Zip	Phone	Ext
-----------	------------	----	-----------	----------	----------	------	-------	-----	-------	-----

List All Referring Doctors

Add Delete Save

Chapter 5 Inventory Menu

A. Product Menu

This is the place where you check-in and manage your products (login as user mgr). The checked-in products will be available in the Superbill billing form.

The products are listed when you get into the sub-Menu. The “Reorder” is in the “Reorder Sign” column when $Units\ In\ Stock \leq Reorder\ Level$ for this product. Use **Save** to re-set “Units in Stock” and “Reorder Level”. You can search products by typing or scanning the product bar code in the *Lookup*. You can **Highlight Reorder Inventory**.

Use **Print** to print inventory list and **Print Label** to print a product barcode into a label printer, such as *Zebra LP 2824 Plus Label Desktop Printer*.

BarCode	Item Name	Vendor Name	Category Name	Expiration Date	Unit	Size	Unit Cost	Sale Price	Units in Stock	Reorder Level	Reorder Sign	Lot Number
020701200022	An Shen Wan	Test Vendor	Chinese Herbs	04/2020	Bottle	200		\$11.00	135	24		
020701200055	Bu Zhong Wan	New Vendor	Chinese Herbs	12/2018	Bottle	200		\$18.00	38			

B. Daily Sales Menu lists the products sold for a day.

Item Number	Item Name	Expiration Date	Unit	Size	Unit Price	Qty	Total Charge
-------------	-----------	-----------------	------	------	------------	-----	--------------

C. Vendor Menu manages the vendors for the clinic.

MDOS Billing Pro v2.2.0.1 - Licensed to MDOS Billing Pro (Expiration Date: 04/30/2015) User Name: mgr

File Home Patient Calendar CPTCode ICDCode **Inventory** Payer Provider Report Utility Help Back Forward

Product Daily Sales **Vendor** Order

Print Vendor List Load WebSite

Vendor Name: New Vendor Phone: (813) 333-3333 Acct No: 100002 Generate Acct No

Contact Person: Peter Email: Website:

Address: 1234 Any Avenue State: FL - FLORIDA City: Tampa Zip: 33333-3333

	Vendor Name	Phone	Account No	Contact Person	Email	Website	Address	City	State	Zip
>	New Vendor	(813) 333-3333	100002	Peter			1234 Any Avenue	Tampa	FL	33333-3333
	Test Vendor	(888) 888-8888	100001	Mary			1111 Any Street	Los Angeles	CA	99999-9999

Save Vendor: [dropdown] Search List All Clear Delete Save

D. Order Menu manages the inventory orders.

Choose a vendor from the drop down list to **Make Order**.

Use **Review Order** to review and modify a not received order.

After **Receive Order**, the products received will be available in the Product menu and Superbill form.

MDOS Billing Pro v2.2.0.1 - Licensed to MDOS Billing Pro (Expiration Date: 04/30/2015) User Name: mgr

File Home Patient Calendar CPTCode ICDCode **Inventory** Payer Provider Report Utility Help Back Forward

Product Daily Sales Vendor **Order**

List All Orders

Product: [dropdown] Vendor: Any Category: Any Unit: [dropdown]

Ordered: [checkbox] Rcvd: [checkbox] Due: [checkbox] Unit Price: [text] Sale Price: [text] Ord Date: [text] Rcv Date: [text] Size: [text]

Item No: [text] Expiration: [text] Lot No: [text] List Open Order only: [checkbox]

Order ID	Item Name	Order Date	Vendor Name	Category	Unit	Size	Unit Cost	Sale Price	Order Qty	Receive Qty	Order By	Receive Date	Receive By	Bar Code
----------	-----------	------------	-------------	----------	------	------	-----------	------------	-----------	-------------	----------	--------------	------------	----------

Vendor: New Vendor Make Order Delete Save Review Order Receive Order

E. Chinese Medicine Menu

Before you can start using TCM Prescription feature, you need to do two things with this menu.

(1) First, you need to login as user **mgr** to modify the pre-loaded Chinese medicine list:

Remove the ones you don't want to use and add your own Chinese medicines.

(2) Second, you need to set the unit price in gram for each Chinese medicine in the list.

Select a medicine, put the new unit price in the field above the medicine list and double check the usual dose, and then click **Save** button at the bottom to save the change.

You can enter English or Chinese in the medicine name and medicine notes fields. This sub-menu works naturally well with Windows Chinese Operating System. For Windows English Operating System, you have to install your favorite Chinese Input software. We can help to install BaiduPinyinSetup for you if needed. Make sure you change your input method back from Chinese to English **BEFORE** you are done with the Chinese input for the medicine name or medicine notes, otherwise the Chinese characters will “float” with your mouse movement.

MDOS Billing Pro v2.4.0.1 - Licensed to MDOS Billing Pro (Expiration Date: 07/31/2015) User Name: mgr

File Home Patient Calendar CPTCode ICDCode Inventory Payer Provider Report Utility Help Back Forward

Product Daily Sales Vendor Order **Chinese Medicine**

Pin Yin or ShengMu:

Medicine ID: Name (English or Chinese): Unit Price: Usual Dose:

Pin Yin (ShengMu): Pin Yin: Notes (English or Chinese):

Medicine ID	Medicine Name	Pin Yin (ShengMu)	Pin Yin	Unit Price	Usual Dose	Notes
1	通麻煎	tyj	tongmajian	\$0.10	50-100g	
2	甘草	gc	gancao	\$0.05	6-20g	
3	忍冬藤	rdt	rendongteng	\$0.02	20-100g	
4	青黛	qd	qingdai	\$1.00	1.5-3g	
5	银杏叶	yxy	yinsingye	\$0.11	9-15g	
6	天竺黄	tzh	tianzhuhuang	\$0.20	6-15g	
7	地骨皮	dgp	digupi	\$0.10	9-20g	
8	苏子	sz	suzi	\$0.05	6-15g	
9	寒水石	hss	hanshuishi	\$0.01	9-20	
10	桃仁	tr	taoren	\$0.20	6-20g	
11	泽泻	zx	zexie	\$0.05	6-20g	
12	枳实	js	jishi	\$0.03	6-20g	
13	徐长卿	xcq	xuchangqing	\$0.15	6-20g	
14	鹿衔草	bcc	lujiancao	\$0.06	6-20g	
15	白僵蚕	bjc	baijiangcan	\$0.12	6-15g	
16	麻黄	mh	mahuang	\$0.02	3-12g	
17	川芎	cx	chuansong	\$0.08	6-20g	
18	茯苓	fl	fuling	\$0.08	8-20g	

Chapter 6 CPTCode Menu

A. ProviderCPTCode Menu

You manage CPT codes in this menu. The user can add/change CPT code on the fly or **Load Provider CPT Code** from a text file. The four rows in the instruction are all valid input formats. The CPT codes will be used in the billing form.

You can save a CPT code as *Frequently Used* or *Most Frequently Used*. This will make the CPT drop down list shorter and easier to choose in the billing form.

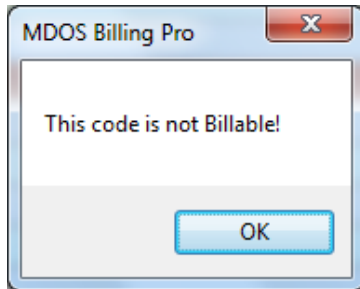
B. Online CPT Code Menu

We used to use this website to search for CPT Code. You can save your favorite CPT code site. You are able to add CPT code, description, modifier, charge and (most) frequently used to your CPT code list from this menu.

Chapter 7 ICDCode Menu

A. ICD-9 Menu

Not all ICD codes are created equal. Some are billable and some are not. You will see the screenshot below when you **Save as Payer ICD-9 Code** for a non-billable ICD code.



For those billable ICD codes, each insurance plan may have its preferred ICD code list that you should use for billing. User can choose a payer's preferred ICD-9 code and save it for that payer.

MDOS Billing Pro v2.0.1.1 - Trial Version (Expiration Date: 12/31/2014)

File Home Patient Calendar CPTCode **ICDCode** Inventory Payer Provider Report Utility Help Back Forward

ICD-9 PayerICD9Code ICD-10

Search Code Search Desc Online ICD-9 Code

ICD-9 Code List Freq. Used Codes in Category ☐ ICD Category 001-139 Infectious And Parasitic Diseases

ICD-9 Desc SubCategory

	ICD Code	Diagnosis	Frequently Used	Billable
1	001	Cholera	☐	False
2	001.0	Cholera due to vibrio cholerae	☐	True
3	001.1	Cholera due to vibrio cholerae el tor	☐	True
4	001.9	Cholera, unspecified	☐	True
5	002	Typhoid and paratyphoid fevers	☐	False
6	002.0	Typhoid fever	☐	True
7	002.1	Paratyphoid fever A	☐	True
8	002.2	Paratyphoid fever B	☐	True
9	002.3	Paratyphoid fever C	☐	True
10	002.9	Paratyphoid fever, unspecified	☐	True
11	003	Other salmonella infections	☐	False
12	003.0	Salmonella gastroenteritis	☐	True
13	003.1	Salmonella septicemia	☐	True
14	003.2	Localized salmonella infections	☐	False
15	003.20	Localized salmonella infection, unspecified	☐	True
16	003.21	Salmonella meningitis	☐	True
17	003.22	Salmonella pneumonia	☐	True

List Frequently Used Codes ☐ Billable ☐ ICD-9 Codes Count: 1510

List All ICD-9 Code Save Frequently Used ☐ Save Payer Save as Payer ICD-9 Code

ICD Code Description Search: In order to make the ICD code pick process more efficient, we use a dummy payer **CLINIC** to store the easy lookup ICD code descriptions. For example, the description is **Cervicalgia** for 723.1 in the ICD codes we purchased as shown below.

MDOS Billing Pro v2.2.0.1 - Licensed to MDOS Billing Pro (Expiration Date: 05/31/2015) User Name: mgr

File Home Patient Calendar CPTCode **ICDCode** Inventory Payer Provider Report Utility Help Back Forward

ICD-9 PayerICD9Code ICD-10

Search Code Search Desc Online ICD-9 Code

ICD-9 Code: 723.1 List Freq. Used Codes in Category ☐ ICD Category: 001-139 Infectious And Parasitic Diseases

ICD-9 Desc: Cervicalgia SubCategory:

ICD Code	Diagnosis	Frequently Used	Billable
723.1	Cervicalgia	☐	True

List Frequently Used Codes ☐ Billable ☒ ICD-9 Codes Count: 1

List All ICD-9 Code Save Frequently Used ☐ Save Payer: CLINIC Save as Payer ICD-9 Code

We can change the description to what we normally use. In this case, we change the description from **Cervicalgia** to **Neck Pain** based on http://en.wikipedia.org/wiki/Neck_pain and save to the dummy payer **CLINIC**. Then we can search for Neck Pain as shown in next page.

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File Home Patient Calendar CPTCode **ICDCode** Inventory Payer Provider Report Utility Help Back Forward

ICD-9 PayerICD9Code ICD-10

Search Code Search Desc Online ICD-9 Code

ICD-9 Code: 723.1 List Freq. Used Codes in Category ☐ ICD Category: 001-139 Infectious And Parasitic Diseases

ICD-9 Desc: Neck Pain SubCategory:

ICD Code	Diagnosis	Frequently Used	Billable
723.1	Cervicalgia	☐	True

List Frequently Used Codes ☐ Billable ☒ ICD-9 Codes Count: 1

List All ICD-9 Code Save Frequently Used ☐ Save Payer: CLINIC Save as Payer ICD-9 Code

Enter Neck Pain in the ICD Desc field and **Search Desc**. The results are shown below for Patient ICD menu and Billing menu respectively. Please note that the **Payer dropdown** has to be **All ICD Codes** in order for this feature to work.

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File Home Patient Calendar CPTCode ICDCode Inventory Payer Provider Report Utility Help Back Forward

Appt Billing Contact ECabinet ICD Insurance ReportsNotes

Patient: Sample, Suzie Payer: All ICD Codes

ICD Code: ICD Codes Count: 1

ICD Desc: Neck Pain

1. 789.07 2. 723.1 3. 4. 5. 6. 7. 8. 9. 10. 11. 12.

	ICD Code	Diagnosis	Frequently Used	Payer Name
▶ 1	723.1	Neck Pain	☐	CLINIC
* 2			☐	

Check here to list frequently used ICD codes only ☐ Tip

Search Code Search Desc Clear Selected Patient Code Save

MDOS Billing Pro - ICD Code Selection

ICD Code: Search Code Search Desc ICD Codes Count: 1

Desc: Neck Pain Payer: All ICD Codes

Use Selected ICD Code Clear Close Check here to list frequently used ICD codes only ☐

	ICD Code	Diagnosis	Frequently Used	PayerName
▶ 1	723.1	Neck Pain	☐	CLINIC
* 2			☐	

ICD-10 corresponding to ICD-9: Starting from V2.3, click any billable ICD-9 code in the first table to get the corresponding ICD-10 code(s) in the second table. (Close to twenty-four thousand entries are provided for more than fourteen thousand ICD-9 codes.) The screen shot is shown below.

MDOS Billing Pro v2.3.0.1 - Licensed to MDOS Billing Pro (Expiration Date: 06/30/2015) User Name: mgr

File Home Patient Calendar CPTCode **ICDCode** Inventory Payer Provider Report Utility Help Back Forward

ICD-9 PayerICD9Code ICD-10

Search Code Search Desc Online ICD-9 Code

ICD-9 Code: 789.66 List Freq. Used Codes in Category ICD Category: 001-139 Infectious And Parasitic Diseases

ICD-9 Desc: Abdominal tenderness, epigastric SubCategory:

ICD-9	Diagnosis	Frequently Used	Billable
11489 789.6	Abdominal tenderness	☐	False
11490 789.60	Abdominal tenderness, unspecified site	☐	True
11491 789.61	Abdominal tenderness, right upper quadrant	☐	True
11492 789.62	Abdominal tenderness, left upper quadrant	☐	True
11493 789.63	Abdominal tenderness, right lower quadrant	☐	True
11494 789.64	Abdominal tenderness, left lower quadrant	☐	True
11495 789.65	Abdominal tenderness, periumbilic	☐	True
11496 789.66	Abdominal tenderness, epigastric	☐	True
11497 789.67	Abdominal tenderness, generalized	☐	True
11498 789.69	Abdominal tenderness, other specified site	☐	True
11499 789.7	Colic	☐	True
11500 789.9	Other symptoms involving abdomen and pelvis	☐	True
11501 790	Nonspecific findings on examination of blood	☐	False

ICD-10	Diagnosis	Conversion Type	Mapping Type
1 R10.816	Epigastric abdominal tenderness	SingleConversion	Approximate
2 R10.826	Epigastric rebound abdominal tenderness	SingleConversion	Approximate

List Frequently Used Codes ☐ Billable ☒ ICD-9 Codes Count: 17553 Clinical judgement required to resolve approximate mapping.

List All ICD-9 Code Save Frequently Used ☐ Save Payer Save as Payer ICD-9 Code

B. PayerICD9Code Menu

You can manage your ICD code for payers in this menu. The **Load Instruction** screenshot below gives payer ICD code loading instructions.

MDOS Billing Pro - ICD Code Load Instruction

You can load payer ICD codes from Text file.

Text File Format (| Vertical Bar Delimited): Payer, ICD9, Diagnosis (Optional), Frequently Used (Optional) (1 or 0, 1 for frequently used code)

The first row below has only Payer and ICD Code.
 The second row below has Payer, ICD Code and Diagnosis.
 The third row below has Payer, ICD Code and frequently used indicator.
 The last row below has Payer, ICD Code, Diagnosis and frequently used indicator.

```
Cigna|338.28
Cigna|338.28|OTHER CHRONIC POSTOP PAIN
Cigna|338.28|1
Cigna|338.28|OTHER CHRONIC POSTOP PAIN|1
```

OK

MDOS Billing Pro v2.0.1.1 - Trial Version (Expiration Date: 12/31/2014)

File Home Patient Calendar CPTCode **ICDCode** Inventory Payer Provider Report Utility Help Back Forward

ICD-9 PayerICD9Code **ICD-10**

Search Code Search Desc Online ICD Code Payer Cigna

ICD Code 346.02 ICD Desc MIGR W AURA NOT INT W SM

	ICD Code	Diagnosis	Frequently Used	Payer Name
1	307.81	TENSION HEADACHE	☐	Cigna
2	338.18	OTHER ACUTE POSTOP PAIN	☐	Cigna
3	338.28	OTHER CHRONIC POSTOP PAIN	☐	Cigna
4	339.10	TENSION HEADACHE UNSP	☐	Cigna
5	339.11	EPIS TENSION HEADACHE	☐	Cigna
6	339.12	CHR TENSION HEADACHE	☐	Cigna
7	346.00	MIGR W AURA NO INT NO SM	☐	Cigna
8	346.01	MIGR W AURA INTR NO SM	☐	Cigna
9	346.02	MIGR W AURA NOT INT W SM	☒	Cigna
10	346.03	MIGR W AURA INTRACT W SM	☐	Cigna
11	346.10	MIG WO AURA NO INT NO SM	☐	Cigna
12	346.12	MIG WO AURA NOT INT W SM	☒	Cigna
13	346.13	MIG WO AURA INTRACT W SM	☐	Cigna
14	346.20	VAR MIGR NO INT NO SM	☐	Cigna
15	346.22	VAR MIGR NOT INT W SM	☐	Cigna
16	346.23	VAR MIGR INTRACT W SM	☐	Cigna
17	346.30	HEM MIGR NO INT NO SM	☐	Cigna
18	346.31	HEM MIGRAINE INTR NO SM	☐	Cigna

List Frequently Used Codes ☐ ICD Codes Count: 94

Clear Delete Save ICD Code Frequently Used ☐ Save Load Instruction Load User ICD Code

The **Online ICD Code** brings you to the <http://www.icd9data.com> website.

C. ICD-10 Menu

This is the ICD-9 counterpart for ICD-10. User can use this menu to get familiar with ICD-10 codes. ICD-10 codes will be used for billing starting Oct 1, 2015. We will purchase ICD-9/ICD-10 codes each year and provide them to our users when they are available. (The purchased ICD-9/ICD-10 codes have to be bundled within a product in order to be distributed based on the license.)

MDOS Billing Pro v2.0.1.1 - Trial Version (Expiration Date: 12/31/2014)

File Home Patient Calendar CPTCode **ICDCode** Inventory Payer Provider Report Utility Help Back Forward

ICD-9 PayerICD9Code **ICD-10**

Search Code Search Desc Online ICD-10 Code Payer

ICD-10 Code A01.05 List Freq. Used Codes in Category ☐ ICD Category A00-B99 Certain infectious and parasitic diseases

ICD-10 Desc Typhoid osteomyelitis SubCategory

	ICD-10 Code	Diagnosis	Frequently Used	Billable
1	A00	Cholera	☐	False
2	A00.0	Cholera due to Vibrio cholerae 01, biovar cholerae	☐	True
3	A00.1	Cholera due to Vibrio cholerae 01, biovar eltor	☐	True
4	A00.9	Cholera, unspecified	☐	True
5	A01	Typhoid and paratyphoid fevers	☐	False
6	A01.0	Typhoid fever	☐	False
7	A01.00	Typhoid fever, unspecified	☐	True
8	A01.01	Typhoid meningitis	☐	True
9	A01.02	Typhoid fever with heart involvement	☐	True
10	A01.03	Typhoid pneumonia	☐	True
11	A01.04	Typhoid arthritis	☐	True
12	A01.05	Typhoid osteomyelitis	☒	True
13	A01.09	Typhoid fever with other complications	☐	True
14	A01.1	Paratyphoid fever A	☐	True
15	A01.2	Paratyphoid fever B	☐	True
16	A01.3	Paratyphoid fever C	☐	True

List Frequently Used Codes ☐ Billable ☒ ICD-10 Codes Count: 1292

List All ICD-10 Code Save ICD Code Frequently Used ☐ Save Save as Payer ICD-10 Code

ICD-9 corresponding to ICD-10: Starting from V2.3, in ICD-10 sub-menu, click any billable ICD-10 code in the first table to get the corresponding ICD-9 code(s) in the second table. (More than seventy-eight thousand entries are provided for about seventy thousand ICD-10 codes.)

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File Home Patient Calendar CPTCode **ICDCode** Inventory Payer Provider Report Utility Help Back Forward

ICD-9 PayerICD9Code **ICD-10**

Search Code Search Desc Online ICD-10 Code Payer

ICD-10 Code **S75.992S** List Freq. Used Codes in Category ☐ ICD Category **A00-B99 Certain infectious and parasitic diseases**

ICD-10 Desc **Other specified injury of unspecified blood vessel at hip** SubCategory

ICD-10	Diagnosis	Frequently Used	Billable
56491 S75.919A	Laceration of unspecified blood vessel at hip and thigh level, unspecified leg, initial encounter	☐	True
56492 S75.919D	Laceration of unspecified blood vessel at hip and thigh level, unspecified leg, subsequent encounter	☐	True
56493 S75.919S	Laceration of unspecified blood vessel at hip and thigh level, unspecified leg, sequela	☐	True
56494 S75.99	Other specified injury of unspecified blood vessel at hip and thigh level	☐	False
56495 S75.991	Other specified injury of unspecified blood vessel at hip and thigh level, right leg	☐	False
56496 S75.991A	Other specified injury of unspecified blood vessel at hip and thigh level, right leg, initial encounter	☐	True
56497 S75.991D	Other specified injury of unspecified blood vessel at hip and thigh level, right leg, subsequent encounter	☐	True
56498 S75.991S	Other specified injury of unspecified blood vessel at hip and thigh level, right leg, sequela	☐	True
56499 S75.992	Other specified injury of unspecified blood vessel at hip and thigh level, left leg	☐	False
56500 S75.992A	Other specified injury of unspecified blood vessel at hip and thigh level, left leg, initial encounter	☐	True
56501 S75.992D	Other specified injury of unspecified blood vessel at hip and thigh level, left leg, subsequent encounter	☐	True
► 56502 S75.992S	Other specified injury of unspecified blood vessel at hip and thigh level, left leg, sequela	☒	True
56503 S75.999	Other specified injury of unspecified blood vessel at hip and thigh level, unspecified leg	☐	False
56504 S75.999A	Other specified injury of unspecified blood vessel at hip and thigh level, unspecified leg, initial encounter	☐	True

ICD-9	Diagnosis	Conversion Type	Mapping Type
► 1 908.3	Late effect of injury to blood vessel of head, neck, and extremities	SingleConversion	Approximate

List Frequently Used Codes ☐ Billable ☒ ICD-10 Codes Count: 91737 Clinical judgement required to resolve approximate mapping.

List All ICD-10 Code Save ICD Code Frequently Used ☐ Save Save as Payer ICD-10 Code

Chapter 8 Patient Menu

A. Patient Main Menu

This is the main part of the software. There are one main menu and nine sub-menus for the patient module. User will spend most of the time working on the patient menus.

The patients are listed in the patient main menu. You can search a patient by either date of birth (DOB), phone number, SSN, Patient ID, (partial) Last Name and/or (partial) First Name, Invoice Number or Invoice Date.

You can double click a patient in the patient list to go to the patient detail ---- the Contact submenu. You need select a patient first by going to patient Contact submenu before you can go to other submenus. You can also open a blank patient detail Contact submenu by **New Patient**.

Starting from V2.3, an ICD-10 ready option is added to check your ICD-10 readiness. You can add ICD-10 codes to your patients one at a time when you have some free time from your business to study and play with ICD-10 codes.

Starting from V2.4, a patient reminder is added to remind you to do something for a patient. This is something similar to the sticky notes we use every day. This feature was recommended by the nice clinic receptionist at my clinic. You can single click a patient in the patient list and **Add** a reminder to the selected patient. You can also **List All** existing reminders. The reminder window will pop up upon login if there are any reminders for that day. The screenshots on next page show the patient reminder page.

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File Home **Patient** Calendar CPTCode ICDCode Inventory Payer Provider Report Utility Help Back Forward

Appt Billing Contact ECabinet ICD Insurance ReportsNotes Rx

DOB / / Phone () - - SSN/ID PatientID

Last Name First Name Invoice # Invoice Date / /

ICD-10 Ready: Yes ☐ Incomplete ☐ No ☐ All ☐ Search Patient Clear Search Reminder: Add List All

All Patients A B C D E F G H I J K L M N O P Q R S T U V W X Y Z New Patient

Patient Reminder

Date 06/19/2015 Reminder: Call to confirm Sat. Appt

Save Close

PTN100001 P

MDOS Billing Pro - Patient Reminder

Last Name First Name Search List All

Date: 06/16/2015 Reminder:

	Patient ID	Last Name	First Name	Reminder Date	Reminder Note
1	PTN100001	Sample	Suzie	06/19/2015	Call to confirm Sat. Appt

Delete Save Patient Screen and Close Close

B. Contact Menu

The *Demographic Info* tab in the Contact menu has detailed patient demographic information and other contact information. You can load patient picture by **Load**. Make appointment for this patient by **Make Appt.**

Use **New Patient** to add a new patient. *Last Name* and *First Name* are the only two fields required to save a new patient. An appointment can be scheduled after the new patient is saved.

We use the provider drop down list above the picture to set the **default provider** for the patient. The default provider will be populated when opening a new billing form for this patient. User can change the service provider for a particular visit in the billing form.

The *Referred By* tab lists the patient or the physician who referred this patient.

C. Appt Menu

This is the patient appointment menu which lists the patient Appointments.

You can add appointment actual arrive time and leave time, Appt Notes by clicking a row in the Patient Appointments list, enter the information and **Save Appt.**

Use the provider drop down list at the upper right corner to choose a provider and display the appointments for the chosen provider. User is able to go directly to the Calendar menu by double clicking on a row in the Patient Appointments list.

D. Billing Menu

Use **New Invoice** to create a new CMS1500 or Superbill invoice. Use Provider drop down list to switch among providers. *Total Balance Due* amount is for all providers.

If *Pop Up Window* is selected in the utility menu, the new Superbill will be popped up in a standalone window. This feature is useful for clinics that have busy schedules.

You can change the Invoice Date for an existing bill and update patient default case type for future billing for this patient. Double click on a row in the billing list to go to CMS1500 menu or Superbill menu for this bill based on the type of bill created initially. You can switch between the CMS1500 form and Superbill form when you are in one of the two billing detail forms.

- E. **ECabinet Menu** Important patient documents can be saved in the ECabinet. You can **Load Picture**, **Save Picture** and **Delete Picture**. Please be aware that picture information takes a lot of space in the database and you only store the information that is absolutely necessary. MDOS uses a separate database just to store the images in this menu.

F. ICD Menu

This is the patient specific ICD code. Once ICD codes are set for a patient, they will be pre-populated for new billing form. If you know the patient's insurance, you would want to choose the Payer from the drop down list and then pick the ICD codes for that payer.

You can select an ICD code and drag-and-drop to an empty ICD cell. All the 14,567 billable ICD-9 codes out of total 17,553 ICD-9 codes are available for you to pick up.

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File Home Patient Calendar CPTCode ICDCode Inventory Payer Provider Report Utility Help Back Forward

Appt Billing Contact ECabinet ICD Insurance ReportsNotes

Patient: Sample, Suzie Payer: All ICD Codes

ICD-9 Code Search Code ICD-9 Desc Search Desc

ICD-9 Code	ICD-9 Desc	Frequently Used	Payer Name
002.2	Paratyphoid fever B	☐	All ICD Codes
002.3	Paratyphoid fever C	☐	All ICD Codes
002.9	Paratyphoid fever, unspecified	☐	All ICD Codes
003.0	Salmonella gastroenteritis	☐	All ICD Codes
003.1	Salmonella septicemia	☐	All ICD Codes
003.20	Localized salmonella infection, unspecified	☐	All ICD Codes
003.21	Salmonella meningitis	☐	All ICD Codes
003.22	Salmonella pneumoniae	☐	All ICD Codes
003.23	Salmonella arthritis	☐	All ICD Codes

ICD-10 Code	ICD-10 Desc	Conversion Type	Mapping Type
A02.22	Salmonella pneumonia	SingleConversion	Exact

Check here to list frequently used ICD codes only ICD Codes Count: 14567 Save Tip

Starting from V2.3, patient ICD-9 and ICD-10 Dual Coding are provided. In ICD sub-menu of Patient menu, select applicable billable ICD-9 code in the first table and the corresponding ICD-10 code(s) will also be displayed in the second table. For **Exact** mapping, the ICD-10 code will be put in the corresponding cell in the ICD-10 code section automatically. For **Approximate** mapping, the user has to apply judgement to pick the right ICD-10 code. Click on **Save** button to save the codes for the patient.

G. Insurance Menu

MDOS Billing Pro v2.0.1.1 - Trial Version (Expiration Date: 12/31/2014)

File Home Patient Calendar CPTCode ICDCode Inventory Payer Provider Report Utility Help Back Forward

Appt Billing Contact ECabinet ICD Insurance CMS1500 Superbill ReportsNotes

Patient: Sample, Suzie New Insurance

Choose from Patient List

Patient Insurance: ☒ Primary ☐ Secondary ☐ Tertiary Patient Insurer Relation: ☒ Self ☐ Spouse ☐ Child ☐ Other Policy Holder: PatientID

Insured: Last Name: Sample First Name: Suzie Middle: DOB: 11/11/1966 Sex: ☒ M ☐ F

Address: 555 Florida Ave State: FL - FLORIDA City: Tampa Zip: 33333-3333

Plan Name: Lifetime Group/Policy #: L19999 Member ID: 2345445

Phone: (813) 777-7777 Employer/School Name: Signature: Signature on File: ☒ No Signature on File: ☐

Payer (Insurer)	Payer ID	Payer Name	Address Line 1	Address Line 2	City	State	Zip
PER10006	Humana	PO Box 14601		Lexington	KY	40512-4601	

Insurance Type: ☒ MEDICARE ☐ MEDICAID ☐ CHAMPUS ☐ CHAMPVA ☒ GROUP HP ☐ FECA BLK LUNG ☐ OTHER

Choose Payer Save

Insurance is needed for CMS 1500 billing form. If the patient is not the insurance policy holder and the insured is also a patient, you can **Choose from Patient List** to get the insurance information. If the patient is the policy holder, the relate information will be copied from the contact menu to this menu automatically when you choose “self”.

MDOS Billing Pro - Patient List

Select a Patient for the Insurance Policy Holder

Last Name First Name

Patient ID	Provider ID	Primary Ins.	Last Name	First Name	MI	DOB	Sex	ICD1	ICD2	ICD3
PTN100001	PHY100001	INS100001	Doe	John		12/31/1968	M	953.1		
PTN100002	PHY100001		TestL	TestF		11/11/1911	M			

Choose from Payer List before you save the patient insurance. Insurance type is also needed in order to complete CMS 1500 form.

MDOS Billing Pro - Payer List

Select a Payer from the List below for the Insurance

Payer Name

Payer ID	Payer Name	Address Line1	Address Line2	City	State	Zip
PER100063	Aetna	P.O.Box 981106		El Paso	TX	79998-11
PER100009	BCBSF	PO Box 1798		Jacksonville	FL	32231-00
PER100062	Cigna	PO Box 182223		Chattanooga	TN	37422-72
PER100065	Cigna Payor 62308	PO Box 188004		Chattanooga	TN	37422-80
PER100066	Humana	PO Box 14601		Lexington	KY	40512-46
PER100067	MHBP	P.O Box 8402		London	KY	40742
PER100060	UHC	PO Box 740800		Atlanta	GA	30374-08

H. CMS1500 Menu

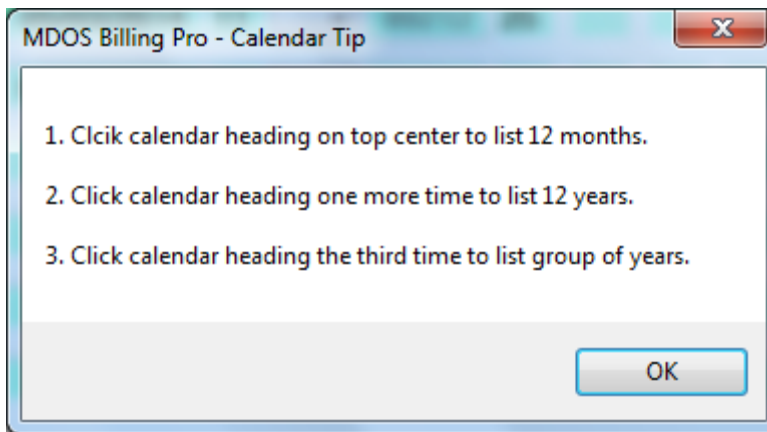
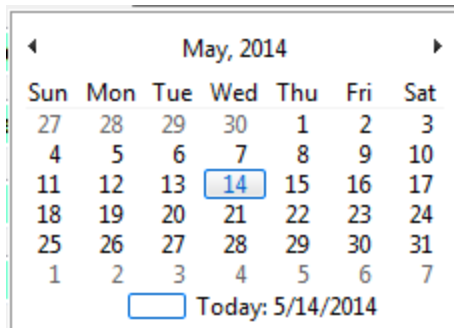
You can go to CMS1500 menu by create a CMS 1500 new invoice in Billing Menu or double click an existing CMS1500 bill in the billing list in Billing Menu.

As mentioned in the CPTCode menu, you can use **Most Frequently Used, Frequently Used** or **All** lists to pick your CPT code from. Or you can type your CPT code into the field to use that CPT code if you know your CPT code by heart.

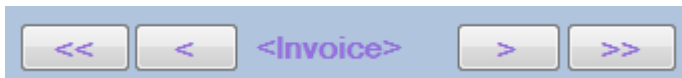
The message “Click an ICD code and then drag and drop to an empty cell” will show up when you put mouse over the **ICD Tip**.

Use **Edit ICD** to change the ICD code for this bill only. Choose an ICD code, then **Use Selected ICD Code** to put the code into the CMS 1500 form. The next time you start a new CMS 1500 form, the ICD codes from ICD menu will be populated. Again, you can use provider drop down list to change the provider for this bill.

The built-in calendar pops up when you double click a date filed. **Calendar Tip** shows you how to “zoom out” the calendar. This applies to the built-in calendar on all forms.



Use the buttons below to go to first/previous or next/last CMS 1500 bill for this patient.



This button below will start a new CMS 1500 form for this patient.



Generate e-Bill will create e-Bill for this bill. **Change Invoice #** is used when you want to re-submit an e-Bill rejected by Clearing House after you correct it. **Replacement** option is used when you want to submit an e-Bill again to replace an e-Bill that has been accepted by payer. **Void** option is used when you want to cancel an e-Bill that has been accepted by payer.

Patient Condition catches additional information for the CMS1500 form. **CMS1500 Form** will display the bill in the new CMS 1500 form 02/12. (Screenshots on next page)

Advanced **Medical Office Software**, LLC

I. Superbill Menu

You can go to Superbill menu by create a Superbill new invoice in Billing Menu or double click an existing Superbill in the billing list in Billing Menu. You can add **visit specific** ICD codes. For a new patient, the very first Superbill ICD codes will be saved if they were not created from the patient ICD sub-menu.

Superbill form and CMS1500 form have many functions in common. Such as **Edit ICD Code**, **ICD Tip** and **Calendar Tip**. Two functions are for Superbill only: **Print Invoice** (screenshot on next page) and **automatically copy total charges from the Products Sold cell in the Product section into Charges field for the recommended CPT code Herbs**.

We use the Product section in the Superbill form to check out products. **Click Barcode field and scan barcode to check out a product**. Alternatively, use **Inventory Lookup** to check out a product when barcode scan is not working somehow for that product. The product expiration date and available quantity are displayed in the *Exp Date* column. Double click the red **X** to remove the product on that row. **Refresh** is used to retrieve the product(s) checked out in the back office computer. **The front office has to initiate the invoice by saving it into database before back office can use it to check out products**.

Billing Note is printed out on the Superbill invoice on the next page.

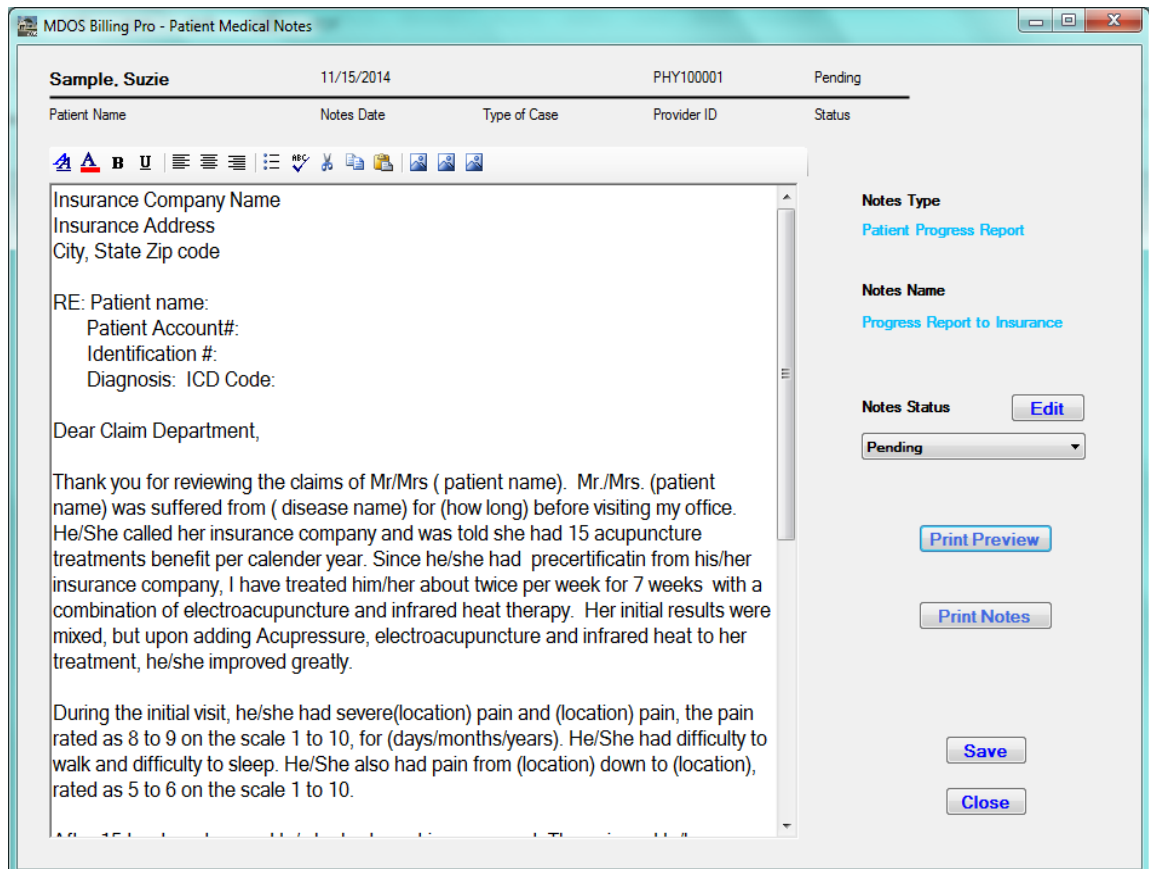
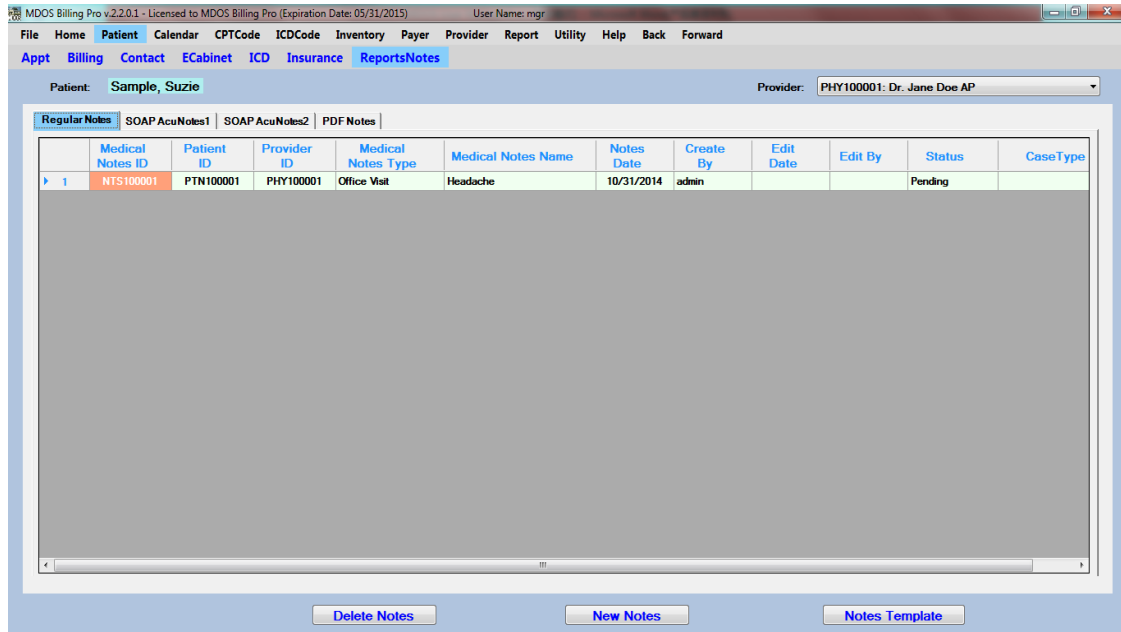
Note: **Billing Note** is not printed if **Credit Balance Auto Apply** option is selected and there is credit applied in the Superbill.

Products	Price	Tax	Units	Total
Products Subtotal				

Procedures + Products	50.00
- Payments	
- Adjustments	
- Credit Applied	50.00
TOTAL DUE	0.00
Credit Balance:	-238.00

J. ReportsNotes Menu

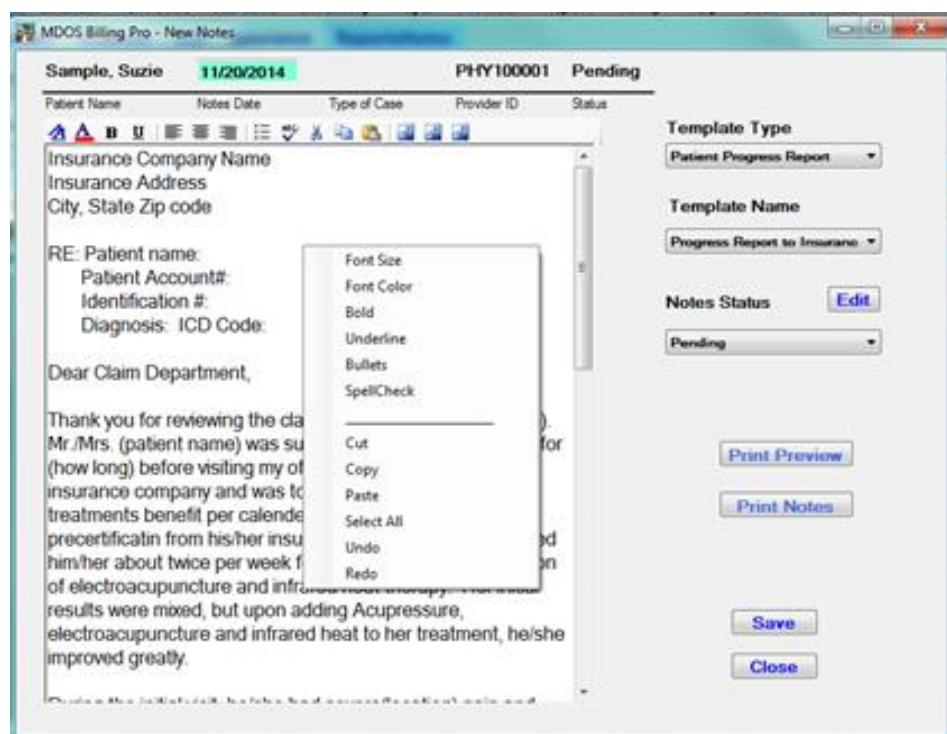
1. **Regular Notes:** There are total 4 Medical Notes menus available in this module.
Double click a row in the Regular Notes list to open existing patient medical notes.
Click **New Notes** to create new medical notes for a visit.



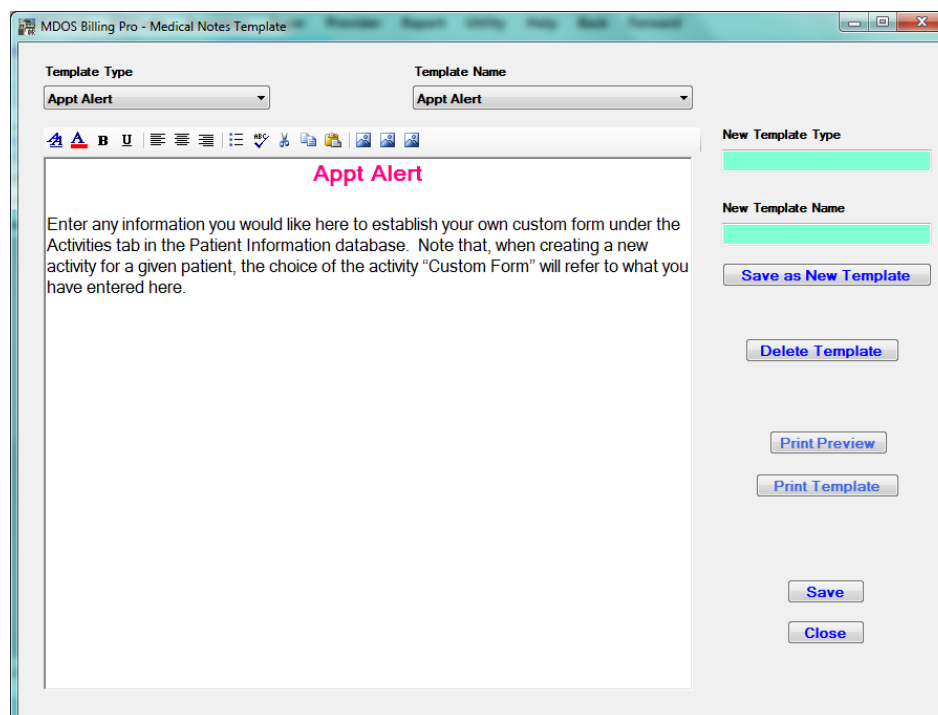
Print Preview a medical notes.

Florida Medical Practice, P.A.		
Patient: Sample, Suzie	Date: 11/15/2014	Provider: Dr. Jane Doe AP
Insurance Company Name Insurance Address City, State Zip code RE: Patient name: Patient Account#: Identification #: Diagnosis: ICD Code: Dear Claim Department, Thank you for reviewing the claims of Mr/Mrs (patient name). Mr./Mrs. (patient name) was suffered from (disease name) for (how long) before visiting my office. He/She called her insurance company and was told she had 15 acupuncture treatments benefit per calender year. Since he/she had precertificatin from his/her insurance company, I have treated him/her about twice per week for 7 weeks with a combination of electroacupuncture and infrared heat therapy. Her initial results were mixed, but upon adding Acupressure, electroacupuncture and infrared heat to her treatment, he/she improved greatly. During the initial visit, he/she had severe(location) pain and (location) pain, the pain rated as 8 to 9 on the scale 1 to 10, for (days/months/years). He/She had difficulty to walk and difficulty to sleep. He/She also had pain from (location) down to (location), rated as 5 to 6 on the scale 1 to 10. After 15 treatments, now He/ she had great improvement, The pain on He/her(locaion) rated as 5, His/her(location) pain was gone and He/she could walk and move much better, plus he/she slept much better. His/ Her (location)pain was gone and his/her (location) were recovered. While Mr./Mrs.(patient name) has improved greatly, I believe that further treatment is warranted. I would thus request another 15 treatments to be administered twice per week over a eight-week period with the goal of resolving Mr./Mrs.(patient name)'s (name of disease) more completely, at which time I will re-evaluate him/her and report back to you once again. If you agree that more treatments are warranted, please contact us at your earliest convenience. Thank you for your time and attention to this progress report. If you have any further questions, you may contact me through the address, phone, fax or e-mail below. Sincerely, Practitioner's name , Title Address City, State Zip code PH: Fax: E-mail:		
Patient Progress Report — Sample, Suzie Page 1 Print Date: 11/15/2014		

Right click inside the notes to activate the Word-like options feature. The contents of medical notes can be copied and pasted between notes and MS Word.



You can add and/or edit your own Medical Notes template by **Notes Template**. The template can be used as a starting point for a patient medial notes. You can save as many templates as you like in each template type.



2. **SOAP AcuNotes1:** The first Acupuncture Notes template.

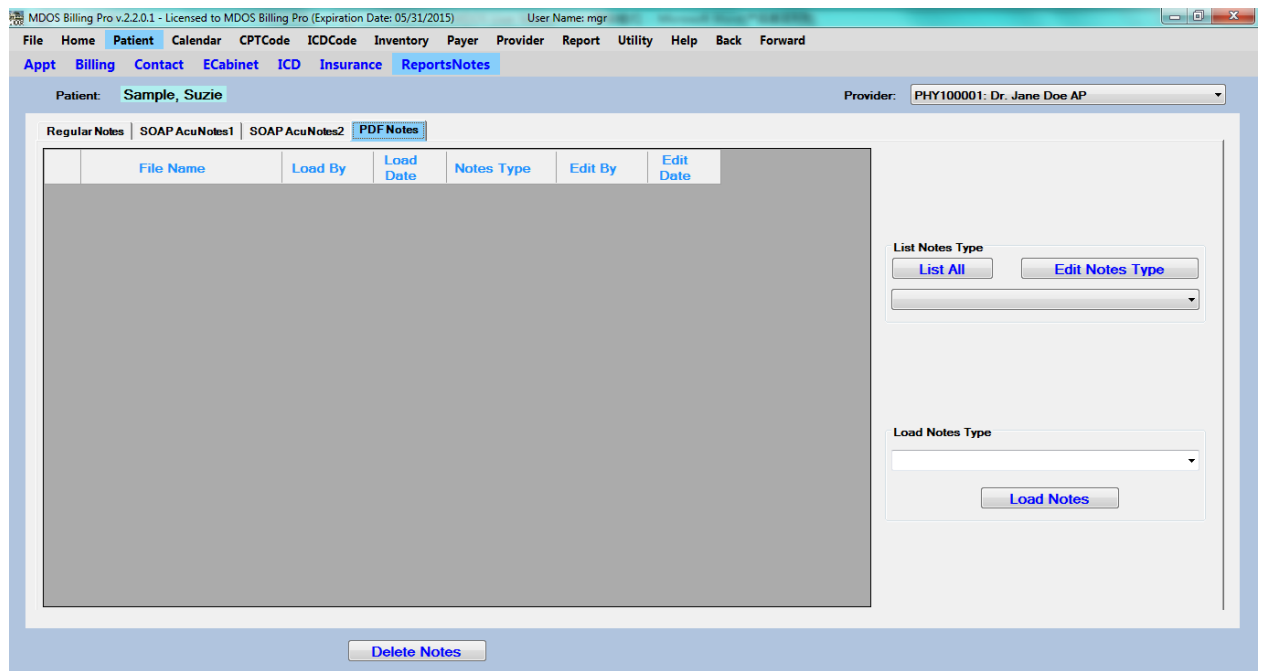
The screenshot shows the 'MDOS Billing Pro - Acupuncture SOAP Notes1' window. At the top, it displays patient information: 'Sample, Suzie', '03/11/2015', 'NTS100001', 'PHY100001', and 'Pending'. Below this is a 'Notes Status' dropdown set to 'Pending' and an 'Edit' button. The form is divided into three tabs: 'Subjective / Objective', 'Assessment', and 'Plan'. The 'Subjective' tab is active, showing a 'Chief Complaint' text area and a 'Signs and Symptoms' dropdown. The 'Objective' tab is also visible, containing fields for 'Temperature', 'Pulse', 'Blood Pressure', 'Respiration', 'Tongue', and 'Other Finding'. At the bottom, there is a 'Comments / Referring Medical Records' section with a rich text editor and a table for 'File Name', 'Load By', and 'Load Date'. The bottom of the window features buttons for 'Print Preview', 'Print Notes', 'Save', 'Close', 'Load Records PDF File', and 'Delete Records'.

3. **SOAP AcuNotes2:** The second Acupuncture Notes template.

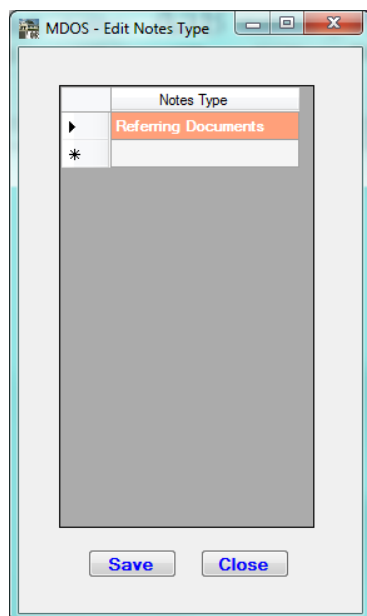
The screenshot shows the 'MDOS Billing Pro - Acupuncture SOAP Notes2' window. It displays patient information: 'Sample, Suzie', '03/11/2015', 'Notes Number', 'PHY100001', and 'Pending'. Below this is a 'Notes Status' dropdown set to 'Pending' and an 'Edit' button. The form has three tabs: 'Subjective', 'Objective', and 'Assessment'. The 'Subjective' tab is active, showing a 'Chief Complaint' text area and an 'Intensity' field with a value of ' / 10'. Below the 'Chief Complaint' is a 'Frequency' section with four radio button options: '0-25%', '26-50%', '51-75%', and '76-100%'. At the bottom, there is a large text area for notes. The bottom of the window features buttons for 'Print Preview', 'Print Notes', 'Save', and 'Close'.

4. PDF Notes:

Users can store scanned PDF files into database, such referring documents from other doctors and other Notes. Combined with ECabinet menu which stores image files, all the patient documents can be stored electronically and retrieved with ease.



Users can **Edit Notes Type**.



K. Rx -- TCM Prescription Menu

	Rx No	Rx Date	Provider ID	Rx Name	Unit Price	Qty	Direction	Warning	Notes
1	RxN100004	06/15/2015	PHY100001	麻黄汤	\$1.79	2			
2	RxN100003	06/15/2015	PHY100001	桂枝汤	\$1.79	2			
3	RxN100002	06/13/2015	PHY100001	麻黄汤	\$1.79	3			
4	RxN100001	06/13/2015	PHY100001	桂枝汤	\$1.55	2			

Create TCM Prescription Template: click on button **Prescription Template**. In the popup window click on **New** first for new template and enter new template name in Chinese or English at the top. Then click on a medicine in the list to select it, enter medicine Dosage in Gram and click **Add to Prescription**. (*Tip: you can enter part of PinYin or PinYin ShengMu and **Lookup** to choose from the short medicine list*) You may also add template direction, warning and notes if any and click **Save** button at the bottom to save the template. You can select an existing template from upper-right dropdown list to edit it. **Search Rx** button at the top is used to let you pick an existing template in case you have too many templates and it is not convenient to pick from the dropdown list.

Medicine Name	Pin Yin	Dose
麻黄	mahuang	9
杏仁	xingren	12
桂枝	guizhi	12
甘草	gancao	9

Medicine Name	Pin Yin	Unit Price	Usual Dose
1 甘草	gancao	\$0.05	6-20g
2 葛根	gegen	\$0.03	8-20g
3 钩藤	gouteng	\$0.04	5-20g
4 瓜蒌	gualou	\$0.05	8-20g
5 骨碎补	gusubub	\$0.04	6-20g
6 桂枝	guizhi	\$0.02	3-15g
7 瓜蒌仁	gualouren	\$0.06	6-20g
8 狗脊	gouji	\$0.03	6-20g
9 干姜	ganjiang	\$0.07	6-18g

Write out a TCM Prescription: Click **New Prescription** button to start new prescription form. Use upper-right dropdown list or **Search Rx** button to choose from a prescription template. You may edit the template for this specific patient and then **Save** it. The saved Rx will be displayed in Rx sub-menu. The **Rx Only Print** option is to print out the TCM prescription without listing prices.

MDOS Billing Pro - New Rx

Patient: Sample, Suzie Search Rx Rx Name: 麻黄汤

Rx Name: 麻黄汤 Medicine: Pin Yin Or ShengMu: Lookup ListAll

Unit Price: 1.79 Qty: 2 Rx Price: 3.58 Usual Dose: Dosage in Gram: Add to Prescription

Meidcine Name	PinYin	Dose
麻黄	mahuang	9
杏仁	xingren	12
桂枝	guizhi	12
甘草	gancao	9

	Meidcine Name	Pin Yin	Unit Price	Usual Dose
1	通瘀煎	tongyujian	\$0.10	50-100g
2	甘草	gancao	\$0.05	6-20g
3	忍冬藤	rendongteng	\$0.02	20-100g
4	青黛	qingdai	\$1.00	1.5-3g
5	银杏叶	yinxingye	\$0.11	9-15g
6	天竺黄	tianzhuhuang	\$0.20	6-15g
7	地骨皮	digupi	\$0.10	9-20g
8	苏子	suzi	\$0.05	6-15g
9	寒水石	hanshuishi	\$0.01	9-20
10	桃仁	taoren	\$0.20	6-20g
11	泽泻	zexie	\$0.05	6-20g
12	枳实	jishi	\$0.03	6-20g
13	徐长卿	xuchangqing	\$0.15	6-20g
14	鹿衔草	luxiancao	\$0.06	6-20g
15	白僵蚕	baijiangcan	\$0.12	6-15g
16	麻黄	mahuang	\$0.02	3-12g

Direction: Warning: Notes:

ZDesigner LP 2824 Plus (ZPL) Print Rx Only Save Close

Manage Patient TCM Prescription: When you get into the patient Rx sub-menu the next time, all the TCM prescriptions for the patient will be displayed. You can modify and save the patient TCM prescription provided the TCM prescription was written out the same day. In another words, you cannot change a TCM prescription that was written out the (calendar) day before or earlier. However, you can conveniently double click on an existing TCM prescription and save it as the prescription for the day, with or without any adjustments.

Chapter 9 Calendar Menu

A. Daily Calendar Menu

Send Email Appt Reminder to send daily appointment reminders for patients who prefer email reminder in *Patient Contact* submenu. **Send Birthday Email** to send emails to patients on their birthday (or the day before if the clinic is not open on that birthday).

In and **Out** columns are used to mark when patient arrives and leaves respectively.

You can double click anywhere in the *Appt Time* column to Edit Appt Time.

Double click an empty cell in other columns to make an appointment. Click a patient in patient list to select a patient, then **Make Appt** to make an appointment for this patient. Click on **Confirmed** column to make multiple appointments on the same time slot.

MDOS Billing Pro - Calendar New

Appt Date: 3/11/2015 Time In: 7:45am Time Out: Special Calendar Events: Dr. Meeting (Edit, Save)

Appt Type: Regular Appt Provider: PHY100001: Dr. Jane Doe AP

Last Name: First Name: Appt Notes:

Search Patient By Last Name: Last Name: Search Search Patient By DOB: DOB: Search DOB Search Patient By Phone: Phone: Search Phone

Patient ID	Provider ID	Primary Payer	Last Name	First Name	MI	DOB	Sex	ICD1	CD	CD	CD	CD	CD	CD	CD	CD
PTN100001	PHY100001	INS100001	Sample	Suzie		11/11/1966	F	789.07								
PTN100002	PHY100001		testf	testf												

List All Make Appt Update Cancel Close

The **Special Calendar Events** is used to mark a time slot so that no appointments can be made at that time.

Time In: 10:15am Time Out: Special Calendar Events: Dr. Meeting (Edit, Save)

Provider: PHY100001: Dr. Jane Doe AP

First Name: Appt Notes:

Search Patient By DOB Search Patient By Phone

MDOS Billing Pro v2.2.0.1 - Licensed to MDOS Billing Pro (Expiration Date: 05/31/2015) User Name: mgr

File Home Patient Calendar CPTCode ICDCode Inventory Payer Provider Report Utility Help Back Forward

Daily Weekly Day of a Week

Help Patient Screen Total: 2 New: 0 Regular: 1 Other: 0 Provider: PHY100001: Dr. Jane Doe AP

Appt Time	Last Name	First Name	Phone	Provider Name	Appt Type	Patient Type	Appt Notes	Confirmed	In	Out
7:00am										
7:15am										
7:30am										
7:45am										
8:00am										
8:15am										
8:30am										
8:45am										
9:00am										
9:15am										
9:30am	Sample	Suzie		Dr. Jane Doe AP	Regular Appt					
9:45am										
10:00am										
10:15am	Dr. Meeting									
10:30am										
10:45am										
11:00am										
11:15am										
11:30am										
11:45am										

3/11/2015, Wednesday 03/11/2015

Refresh Screen Print Screen PDF995 Print App Send Birthday Email Send Email Appt Reminder

You can do three things after you click on an existing appointment row to select that appt: (1) **Go to Patient Screen → Contact Screen → Billing Screen to do billing.**
 (2) Right-click & hold the mouse to drag & drop to change the Appt time.
 (3) Double click to edit the appointment as shown below.

MDOS Billing Pro -- Patient Existing Appt

Appt Date: 10/06/2014 Time In: 8:30am Time Out:

Appt Type: Regular Appt Provider: PHY100001: Dr. Jane Doe AP

Last Name: Sample First Name: Suzie

Patient Type: Confirm Type:

Appt Notes:

Buttons: Edit, Save Appt, Delete Appt, Close

Click Help to display calendar instructions: Steps 1 and 2 apply to *Daily Calendar*, Steps 3 and 4 apply to *Weekly Calendar* and *Day of a Week Calendar*.

MDOS Billing Pro - Calendar Instruction

Step 1. Click on any ApptTime Cell to select ApptTime Cell.

Step 1a. Double Click on the selected ApptTime Cell to Edit Appt Time.

Step 2. Click on an empty Non-ApptTime Cell to select a row.

Step 2a. Double Click on the selected row to Make new Appt.

Step 3. Make sure the 'Drag And Drop' option is selected.

Step 3a. Click on an Appt Non-ApptTime Cell to select a row.

Step 3b. Right Click and hold to Drag the selected row and Drop it to an empty row to change Appt date and time.

Step 4. Make sure the 'Copy And Drop' option is selected.

Step 4a. Click on an Appt Non-ApptTime Cell to select a row.

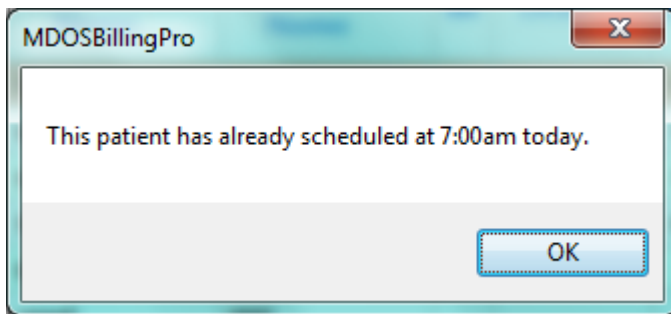
Step 4b. Right Click and hold to Copy the selected row and Drop it to an empty row to make a new Appt.

OK

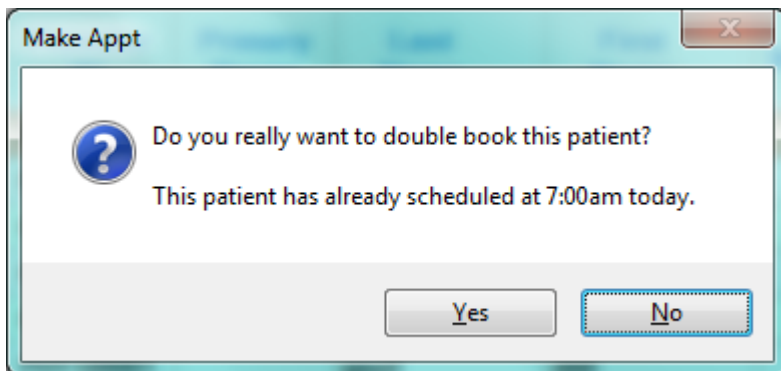
Same Patient Multiple Appointments in the Same Day

No ☒ **Yes, Multiple Appoinrmets Allowed** ☐ **Save**

If you use the default “Same Patient Multiple Appointments in the Same Day” **No** option, then you cannot book multiple appointments for the same patient on the same day. The system will give a warning as shown below and the duplicate appointment will NOT be booked.



However, if the **Yes, Multiple Appointments Allowed** option is selected, and then the user will have the chance to either not book a duplicate appointment or book the duplicate appointment.



MDOS Billing Pro v.2.2.0.1 - Licensed to MDOS Billing Pro (Expiration Date: 05/31/2015) User Name: mgr

File Home Patient **Calendar** CPTCode ICDCCode Inventory Payer Provider Report Utility Help Back Forward

Daily Weekly Day of a Week

Help Patient Screen Total 2 New 0 Regular 2 Other 0 Provider:

Appt Time	Last Name	First Name	Phone	Provider Name	Appt Type	Patient Type	Appt Notes	Confirmed	In
7:00am	Sample	Suzie	(813) 777-7777	Dr. Jane Doe AP	Regular Appt				☐
7:15am									☐
7:30am									☐
7:45am									☐
8:00am	Sample	Suzie	(813) 777-7777	Dr. Jane Doe AP	Regular Appt				☐
8:15am									☐
8:30am									☐

B. Weekly Calendar Menu

Appointments for six days are displayed. The main purposes of this form are:

- (1) Change appointment date and time across days by drag and drop.
- (2) Make multiple appointments for a patient by copy and drop.

1st Date Fixed ☒

This option makes the first calendar date fixed while changing the dates for the other five calendars simultaneously.

1st Time Fixed ☒

This option makes the first calendar time fixed while changing the time for the other five calendars simultaneously.

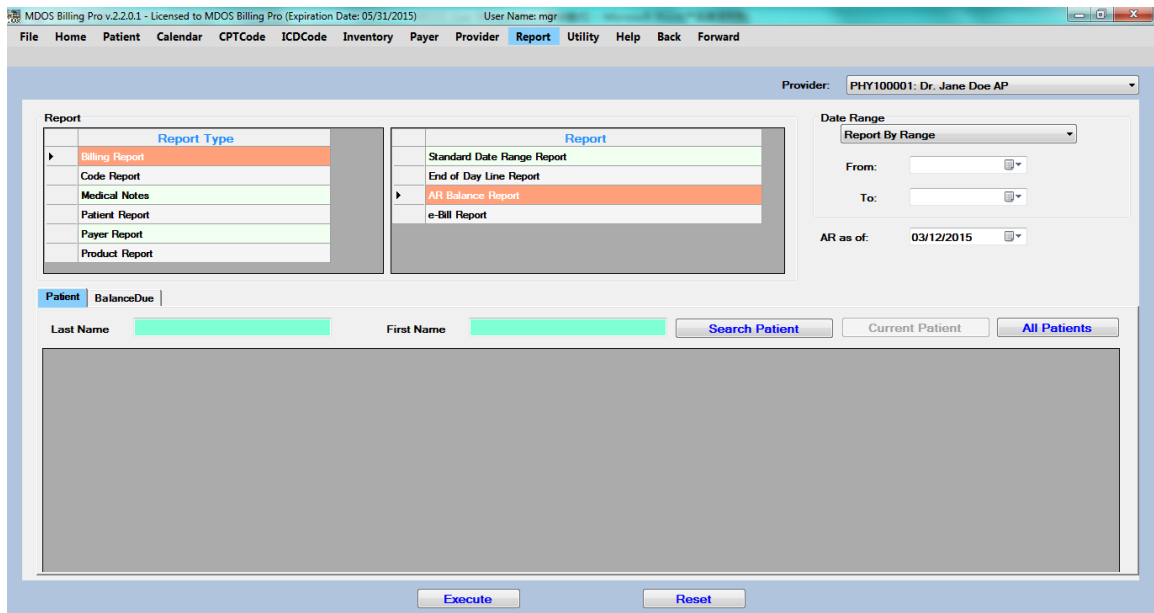
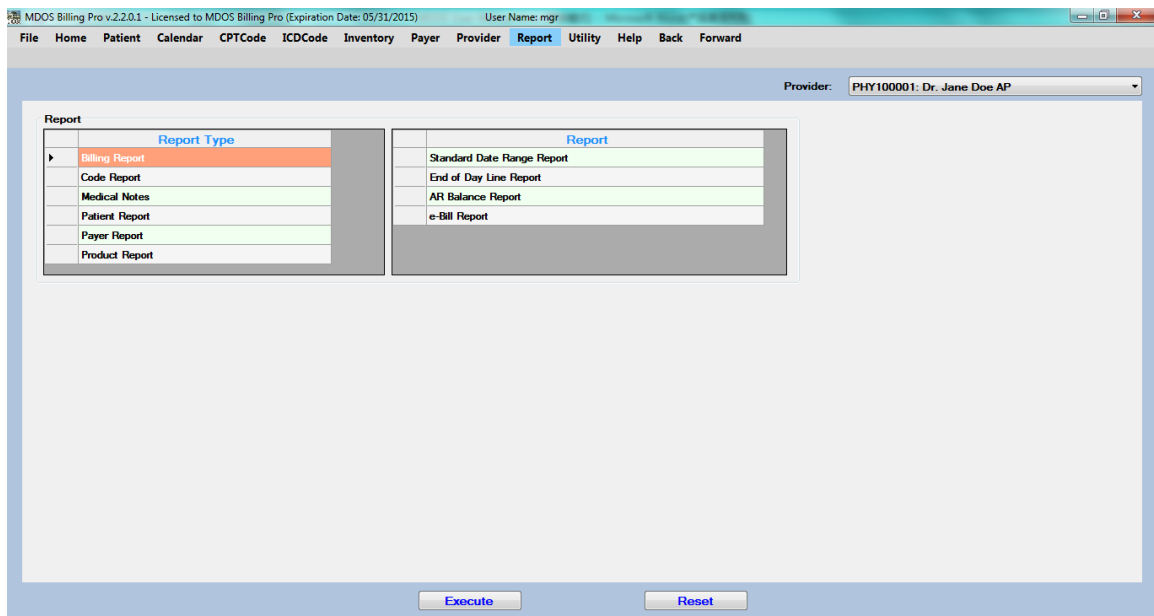
C. Day of a Week Menu

The only difference between this menu and the Weekly menu is that instead of contiguous days, this menu displays a certain day of week for six weeks.

Chapter 10 Report Menu

A. Billing Report

The list on the left displays the *Report Type*. The available *Reports* will be listed on the right by clicking a report type on the left. The needed criteria and / or tabs will show up when clicking on a specific report. The billing reports can help the practice to get an overview of the operation. More advanced analytics reports will be available in future release. The billing data is the practice's asset, if used properly, can help the practice to give patient better treatment, to negotiate better payer contract and to maximize practice profit.



A sample *AR Balance Report* is displayed below. The product charge is included in the total invoice charge.

MDOS Billing Pro - Billing Report

Dr. Jane Doe AP Close PDF Detail Days <= 30 30-60 60-90 90-120 120+

The First Page(s) Detail \$298.50 0.00 0.00 0.00 0.00

	Last Name	First Name	Invoice #	Date of Service	Total Charge	Prod Charge	Invoice Charge	Total Adjust	Paid Amount	Balance Due
0			Inv Total		\$298.50	\$98.50	\$298.50	\$0.00	\$0.00	\$298.50
1	Doe	Joe	INV100003	10/04/2014	\$22.00	\$22.00	\$22.00	\$0.00	\$0.00	\$22.00
2	Sample	Suzie	INV100002	09/06/2014	\$40.50	\$40.50	\$40.50	\$0.00	\$0.00	\$40.50
3	Sample	Suzie	INV100001	09/06/2014	\$236.00	\$36.00	\$236.00	\$0.00	\$0.00	\$236.00

A sample *End of Day Line Report* is displayed below.

MDOS Billing Pro - Daily Payment Report

Print Payment Report Payment All Close Cash 0.00

☒ A11 ☐ Odd ☐ Even ☒ A11 ☐ Payment Only ☐ Payment and Adjustment Check 22.00

DOS: 05/14/2014, Wednesday Credit Card 55.00

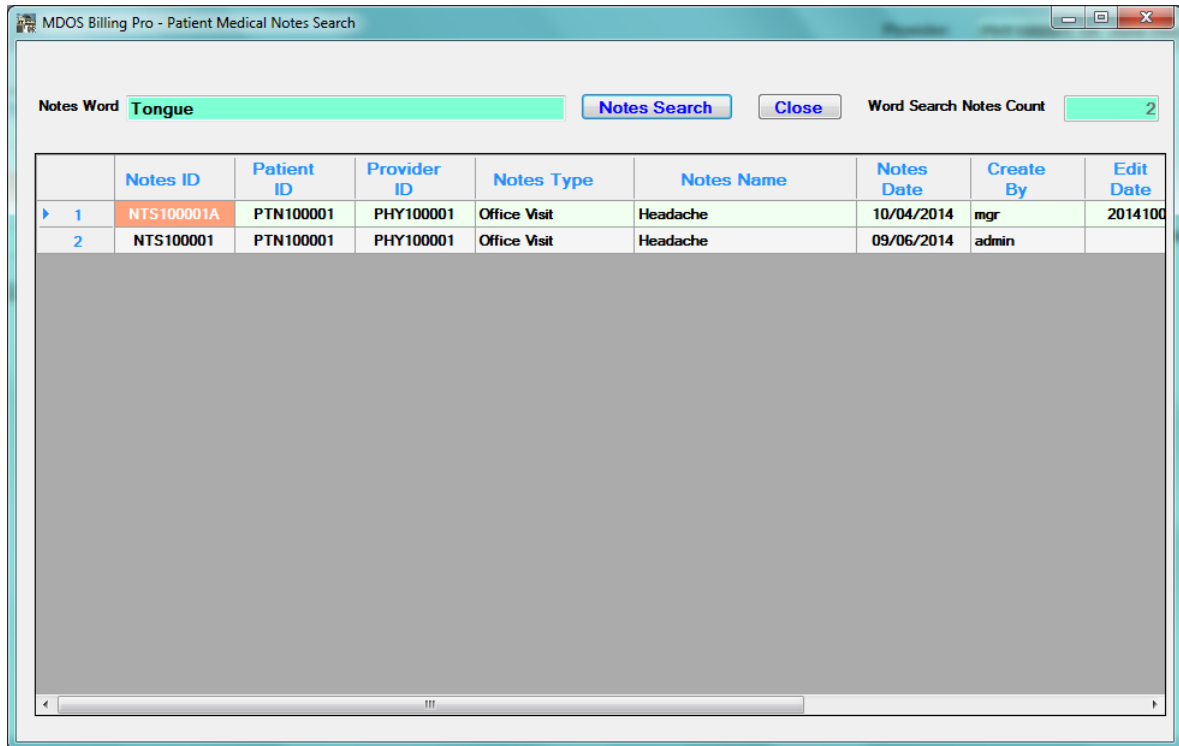
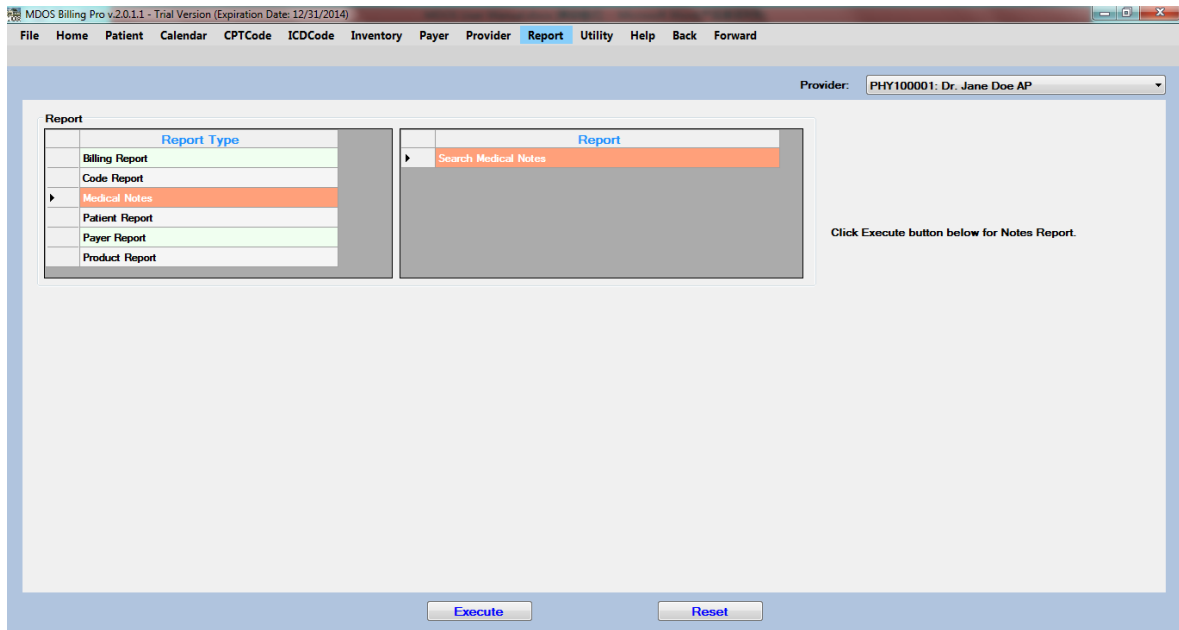
Other 0.00

Total 0.00 77.00 0.00 77.00

	Invoice Number	Last Name	First Name	CPT Code	Paid Date	Paid By	Tax	Total Charge	Adjust.	Payment
1	INV100002	Doe	John	99070		Check		\$22.00	\$0.00	\$22.00
2	INV100002	Doe	John	97811		Credit Card		\$55.00	\$0.00	\$55.00

B. Medical Notes Report

We introduce the **Search Medical Notes** report to conclude this chapter. This report lists the Medical Notes based on a search word. You can double click a Medical Notes in the list to open it.



The searched word is highlighted in **red**. Please be aware that the word search is case insensitive while the highlight is case sensitive.

MDOS Billing Pro - Patient Medical Notes

10/04/2014 Cash PHY100001 Pending

Patient Name	Notes Date	Type of Case	Provider ID	Status
Chief Complaint:Headache Subjective: Objective: Pulse: Tongue: Assessment: Plan: Points: Herbs / Formulas:				

Notes Type
Office Visit

Notes Name
Headache

Notes Status [Edit](#)

Pending

[Print Preview](#)

[Print Notes](#)

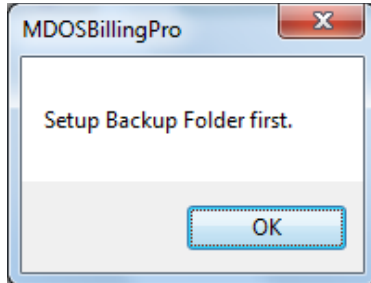
[Save](#)

[Close](#)

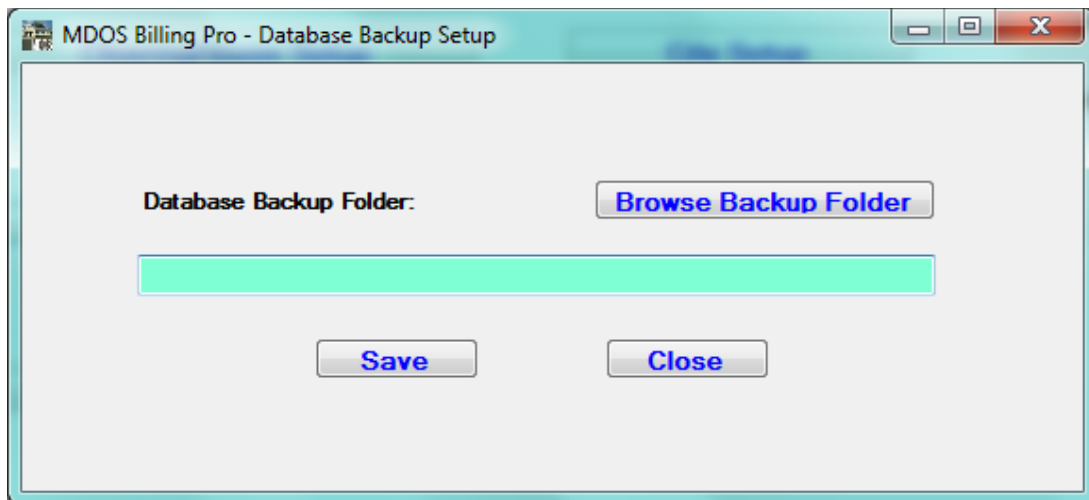
Chapter 11 File Menu

A. Backup Database

The window below pops up when you try to backup database without a backup folder.



Then you will have the chance to set up the backup folder after clicking **OK**.



Click **Browse Backup Folder** to choose the database backup folder. Once you have your database backup folder, you can use **Backup Database** from File Menu to back up the databases. It is recommended to make a daily backup of the MDOS databases at the end of the day. It is highly recommended that you make an extra copy of the database backup to your flash drive at least once a week.

B. Exit

Use *Exit* option or Alt + F4 to exit MDOS Billing Pro.

Chapter 12 Technical Support

We provide standard technical support for life when you purchase and renew MDOS Billing Pro©. The “standard technical support” means that other users may have the same problem you have regarding the functional problem in the software. You will receive free software upgrade when you have a current and non-expired license with us.

We welcome our users’ ideas on how to make the software better. All the good ideas will be incorporated into the software and available to our users in future release.

If you have a need to migrate your data from other system to MDOS, we will evaluate case by case on the cost of the migration based on the kind of database you are currently using and the information you want to migrate.

The technical support does not include on helping out to do your billing: which ICD/CPT code to use, and how much to charge for a CPT code etc.

We provide guidance and support in the process of setup electronic billing with clearing houses Post-N-Track and Availity upon your purchase of MDOS Billing Pro©. We may extend the support list in the future based on user input. We do not support post-setup problems such as clearing house reporting problem or claim submission processes issue. These issues should be handled by either the clearing house or the payer.